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Nortel Networks Call Center

Set Up and Operation Guide

NORTEL NETWORKS

Nortel Networks Call Center Set Up and Operation Guide

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Chapter 1
About Nortel Networks Call Center

This guide leads a Call Center Administrator or a System Administrator through setting up and operating Call Center, and is an ongoing reference.

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. Calls can be routed based on the origin of the call, the destination of the call, or the information entered by the caller. Callers can be given high or low priorities. Callers can overflow to different groups or skillsets of agents, transfer out of the system, leave a message, and hear announcements or informative messages.

You set up and operate Call Center through CallPilot Manager, the web-based interface, and from a telephone. If you use the CallPilot 100/150 system you can set up and administer some Call Center functionality from a two line display telephone.

Professional and Basic Call Center

Basic Call Center and Professional Call Center are available. The table "A comparison of Basic and Professional Call Center" on page 15 shows the differences between them. You can use Basic Call Center on a CallPilot 100/150 system. You can use Basic or Professional Call Center on a Business Communications Manager system.

Call Center features

Call Center has many features that give your call center advanced and flexible call handling.

Intelligent Routing	Intelligent Routing gives you advanced methods for routing calls through your call center. How calls are directed is based on various input conditions. Intelligent CLID/DNIS Routing: • is the ability to route calls according to CLID/ANI, DNIS, ISDN Calling Number • is applied when calls first enter the Call Center • is available if you use Professional Call Center Intelligent Caller Input Routing, Basic: • is the ability to route calls to the Auto Attendant, a Custom Call Routing (CCR) Tree, the operator or a skillset mailbox • routing is applied when the caller presses a telephone button in response to instructions played in a greeting Intelligent Caller Input Routing, Advanced: • includes the Basic capabilities plus the ability to create rules that route calls to other skillsets and locations depending on the caller input • is available if you use Professional Call Center • lets you change the priority of the call Intelligent Overflow Routing: • routes calls to an extension, a mailbox, an external phone number, the Auto Attendant, a skillset mailbox or a CCR Tree • lets you change the priority of the call
Flexible routing steps	You can assign these routing steps to Day and Night Routing Tables, Overflow and Advanced Call Input Routing: • transfer to a mailbox • transfer to an extension • transfer to an external telephone number • transfer to the Auto Attendant • transfer to an operator • transfer to a skillset mailbox • transfer to a CCR Tree • move to another skillset using Advanced Call Input Routing
Agent priority and dynamic agent priority	You can assign agents a priority that represents their level of expertise. You can assign an agent a priority between 1 and 20, where 1 is the highest priority. If you use Call Center Professional you can assign agents different priority levels depending on the skillset they are logged on to.
Choice of call presentations	You can assign agents forced calls, or let agents answer calls manually.

Dynamic call priority	You can have the priority of a call changed in the Intelligent CLID/DNIS Routing table, the Intelligent Caller Input Routing Table and the Intelligent Overflow Routing table. With call priority, all calls that have a higher priority are handled before lower priority calls, no matter how long the lower priority calls are waiting. For an example of using Intelligent Overflow Routing to control call priority, see “Example 2” on page 117.
Delegated access to Call Center	You or the System Administrator can create a password to give a supervisor access to Call Center administration.
Multimedia Call Center	If you have Multimedia Call Center enabled, agents can have multimedia sessions with callers. Callers click an HTML link to connect to the call center.s
CallPilot Manager	CallPilot Manager is a web-based interface you can use to administer CallPilot and Call Center.
Call monitoring	Agents can monitor the call activity in the skillsets they are logged on to. You and supervisors can monitor the call activity per skillset or on a system wide basis.
Call Center Reporting	You can generate the System Configuration report to view Call Center settings. If you have Call Center Reporting enabled, you can view real time statistics and comprehensive management information about the day-to-day performance of your call center.

Using CallPilot call routing with Call Center

CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Auto Attendant and call handling capabilities

CallPilot has two powerful call routing features: Auto Attendant (AA) and Custom Call Routing (CCR). These features route incoming calls to telephones and voice mailboxes. You can also use these features to route calls to Call Center skillsets.

Auto Attendant

The Auto Attendant answers incoming calls and presents callers with a greeting. After the greeting, the Auto Attendant Menu offers callers a range of options that they can select using the dialpad of their telephone. Using these options, callers can transfer themselves from the Auto Attendant to a skillset by entering the Control DN of the skillset.

Note: Include the number of the Control DN in your Auto Attendant Greeting.

For information about how to configure the Auto Attendant, refer to the *CallPilot Set Up and Operation Guide*.

Custom Call Routing (CCR)

With CCR you can replace the Auto Attendant menu with an expanded menu that can include several sub-menus to offer callers a wider range of options. You can give callers access to a Call Center skillset by adding an internal transfer that transfers the caller to the Control DN of the skillset.

For more information about transfers and CCR, refer to the *CallPilot Manager Set Up and Operation Guide*.

A comparison of Basic and Professional Call Center

Features	Basic Call Center for CallPilot 100/150	Professional Call Center for Business Communications Manager	Basic Call Center for Business Communications Manager
Number of skillsets	2	50	2
Number of configured agents (available agent IDs)	20	250	20
Number of agent priority levels	20	20	20
Dynamic agent priority levels	Not available	20	Not available
Dynamic call priority levels	Available	Available	Available
Number of active agents	10	max 80, min 20	10
Number of active calls in all skillsets	15	100	15
Maximum number of active calls per skillset	15	64	15
Number of lines that can be configured for Call Center	15	100 A maximum of 24 of these lines can be VoIP trunks.	15
Number of voice ports (shared with CallPilot or dedicated)	8	32	32
Number of routing tables per skillset	2	2	2
Number of greetings	10	150	30
Number of steps per routing table	20	20	20
Number of overflow rules per skillset	20	20	20
Number of skillset mailboxes	2	50	2
Number of supervisors	10	80	10
Supervisor functionality, including call monitoring	Muted monitor	Silent monitor	Silent monitor
Maximum number of simultaneous monitoring sessions	6	6	6
Caller Input Tables	Not available	50	Not available

Features	Basic Call Center for CallPilot 100/150	Professional Call Center for Business Communications Manager	Basic Call Center for Business Communications Manager
Basic Intelligent Caller Input Routing: the ability to route a call to an Operator, Auto Attendant, skillset mailbox, CCR Tree or internal or external number	Available	Available	Available
Advanced Intelligent Caller Input Routing: the ability to route a call based on multi-digit fixed or variable strings	Not available	Available	Not available
Delegated Call Center Administration: the System Administrator can create a password to give a Call Center Administrator or supervisor access to Call Center administration.	Available	Available	Available
Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator.	Available	Available	Available
Intelligent CLID/DNIS Routing	Not available	Available	Not available
Overflow rules per skillset	20	20	20
Overflow skillsets	1	49	1
Service Mode: you specify the start and end times for the day and night skillset for each day of the week	Available	Available	Available
Limited Feature 983 telephone administration	Available	Not available	Not available
CallPilot Manager	Available	Available	Available
Call Center Reporting	Enabled with optional Software Authorization Code	Available with Call Center Professional. Must be enabled with the Software Authorization Code with the Call Center Professional Upgrade.	Enabled with optional Software Authorization Code
Expected Wait Times	Not available	20 tables	5 tables
Activity Codes	Not available	2,000 entries	2,000 entries

Related documents

For more information about Call Center refer to the:

- *Nortel Networks Call Center Agent Guide*
- *Nortel Networks Call Center Supervisor Guide*
- *CallPilot 100/150 Call Center Telephone Administration Guide*
- *Nortel Networks Call Center Reporting Set Up and Operation Guide*
- *Multimedia Call Center Set Up and Operation Guide*
- *Multimedia Call Center Web Developer Guide*

For information about setting up CallPilot refer to the:

- *CallPilot Manager Set Up and Operation Guide*
- *CallPilot 100/150 Telephone Administration Guide*
- *CallPilot 100/150 Installation and Maintenance Guide*

For information about configuring telephony resources, refer to the:

- *Business Communications Manager Programming Operations Guide*
- *Norstar System Coordinator Guide*

How to get help

USA and Canada

Authorized Distributors - Technical Support

Telephone:
1-800-4NORTEL (1-800-466-7835)
If you already have a PIN Code, you can enter Express Routing Code (ERC) 196#.
If you do not yet have a PIN Code, or for general questions and first line support, you can enter ERC 338#.

Website:
http://www.nortelnetworks.com/support

Presales Support (CSAN)

Telephone:
1-800-4NORTEL (1-800-466-7835)
Use Express Routing Code (ERC) 1063#

EMEA (Europe, Middle East, Africa)

Technical Support - CTAS

Telephone:
00800 800 89009

Fax:
44-191-555-7980

email:
emeahelp@nortelnetworks.com

CALA (Caribbean & Latin America)

Technical Support

Telephone:
1-954-858-7777

email:
csrmgmt@nortelnetworks.com

APAC (Asia Pacific)

Technical Support

Telephone:
+61 388664627

Fax:
+61 388664644

email:
asia_support@nortelnetworks.com

Chapter 2
About setting up Call Center

You can set up Call Center using a display telephone on your phone system, or using the web-based CallPilot Manager on a web browser from a computer on your network. For some Call Center tasks, such as initializing skillset mailboxes, you must use a phone. If you use Basic Call Center on CallPilot 100/150 you can do many Call Center tasks from a phone. Refer to the *CallPilot 100/150 Call Center Telephone Administration Guide* for more information.

Using CallPilot Manager to set up Call Center

CallPilot Manager operates on a CallPilot 100/150 or Business Communications Manager system. You access CallPilot Manager on a web browser from a computer on your network.

System requirements

Before you use CallPilot Manager, your Business Communications Manager or CallPilot 100/150 system must be configured and Call Center must be enabled. For how to enable software authorization codes for Call Center, refer to "Enabling Software Authorization Codes" on page 20.

Computer requirements

The computer you use to run CallPilot Manager must have:

- Windows 95 or later, with P133 or later CPU (or compatible)
- 64 MB RAM, 10 MB disk space
- Minimum screen resolution of 1024 X 768 pixels

Browser requirements

To use CallPilot Manager you must have:

- either Microsoft Internet Explorer 4.0 or later, or Netscape Communicator 4.0.5 or later, but not Netscape 6.0

If you use Netscape Communicator, set these parameters:

- Enable Java: on
- Cached document comparison: every time
- If you use Netscape Communicator version 4.77 and not all the Call Center settings shown in this guide appear in your browser, refresh the browser by clicking the View menu and clicking Reload. If you still cannot view the settings, upgrade your browser.

If you use Microsoft Internet Explorer, set the following parameters:

- Check for newer versions: every visit to the page
- Java JIT compiler enabled: on

For more information about these settings, refer to your web browser online Help.

Enabling Software Authorization Codes

You enable software authorization codes to install Call Center, to increase the number of agents at your call center, and to enhance your call center with options such as Multimedia Call Center and Call Center Reporting.

To enable a software authorization code for Business Communications Manager

1. Point your web browser to the URL
   https://<IP address>:6800
   where <IP address> is the IP address of Business Communications Manager.
   The Business Communications Manager Unified Manager screen appears.
2. Click the **Configure** button.
   The Login screen appears.
3. In the **User ID** box type the supervisor user ID.
4. In the **Password** box type the supervisor password.
5. Click the **Login** button.
   The Business Communications Manager screen appears.
6. Click the **System** key.
7. Click the **Licensing** heading.
   The Licensing Setting screen appears.
8. On the **Configuration** menu click **Add a Keycode**.
   The Applied Keycodes screen appears.
9. In the **Keycode** box type the number of the software authorization code for the option you want to install.
10. Click the **Save** button.
11. If you enable the software authorization code for Call Center or Professional Call Center, you must reboot your system by following steps 12 through 14.
    If you enabled any other software authorization codes you do not have to reboot your system.
12. Choose **System** in the navigation tree.
    The Logoff menu is enabled.
13. On the **Logoff** menu, click **Reboot**.
    A message appears that asks you to confirm your request to reboot.
14. Click the **Yes** button to reboot.

To enable a software authorization code for CallPilot 100/150

1 Start CallPilot Manager.

2 Click the **Configuration** heading.

3 Click the **Installed Options** link.
The Installed Options page appears.

4 In the **Keycode** boxes type the software authorization code for the option you want to install.

5 Click the **Add** button.
The option you installed appears in the Installed Options list.

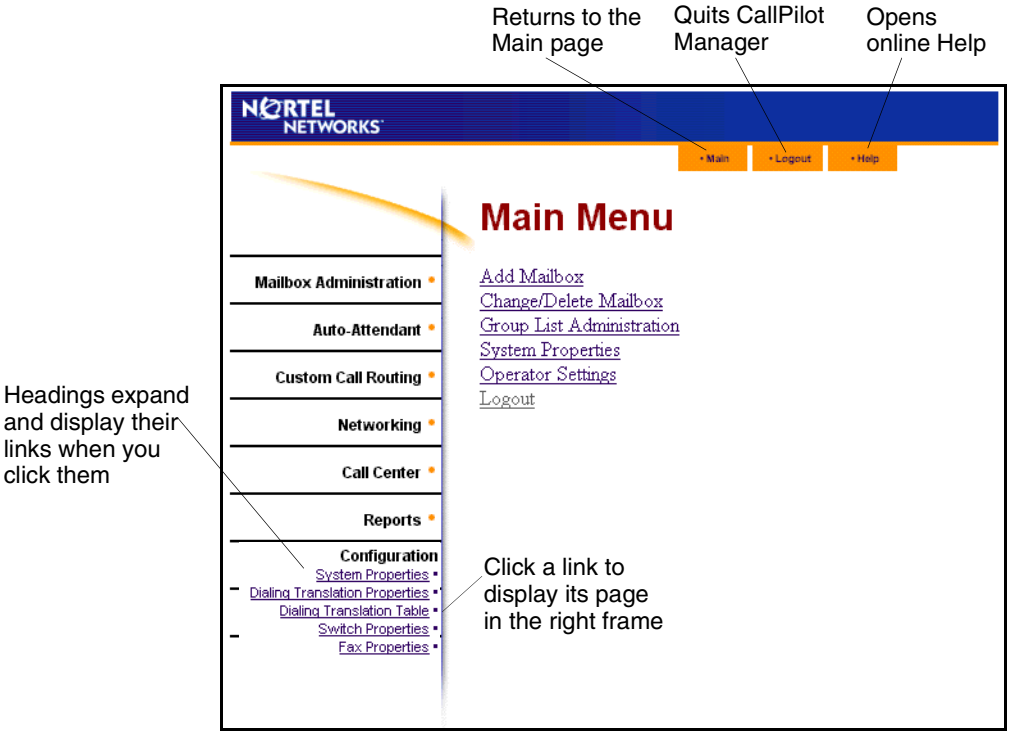
To start CallPilot Manager on Business Communications Manager

1. Point your web browser to https://<IP address>:6800/CallPilotManager
   where <IP address> is the IP address of Business Communications Manager.
   For information about the IP address, ask your network administrator.
   The Administration Login page appears.
2. In the **Password** box, type the System Administrator password.
3. Click the **Submit** button.
   The CallPilot Manager Main Menu appears.

To start CallPilot Manager on CallPilot 100/150

1. Point your web browser to https://<IP address>/CallPilotManager.
   Where <IP address> is the IP address of the CallPilot 150.
   For information about the IP address, ask your network administrator.
   The Administration Login screen appears.
2. In the **Password** box, type the System Administrator password.
3. Click the **Submit** button.
   The CallPilot Manager Main Menu appears.

About the CallPilot Manager interface



System timeout

A CallPilot Manager session times out after 10 minutes of inactivity. This is a security feature that prevents unauthorized access to the system.

If your session times out, the login page appears and a message that says that the session has expired. You must log on to continue programming Call Center.

If the system times out while you are working on a page, any settings that you have not entered on the system by pressing the Submit button are not entered.

Call Center password access

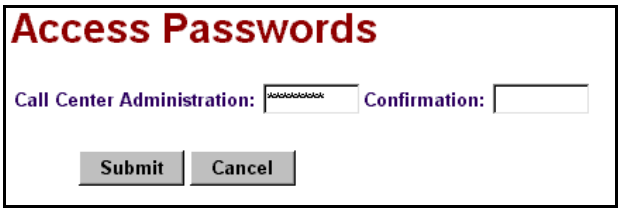
If you want to limit access to CallPilot Manager, you can create or change a Call Center Administrator password that limits CallPilot Manager access to just the Call Center settings.

To create a Call Center Administrator password

1 Start CallPilot Manager.

2 Click the **Configuration** heading.

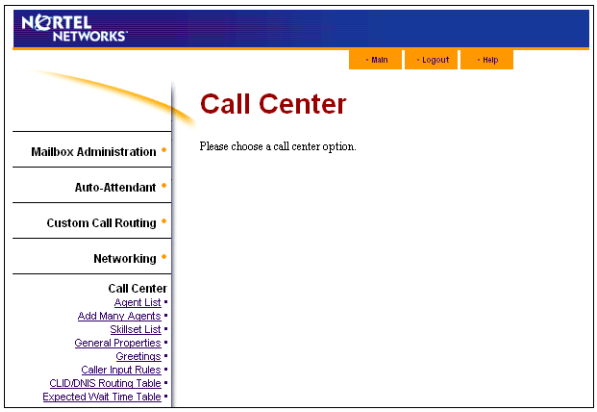
3 Click the **Access Passwords** link.
The Access Passwords page appears.



4 In the **Call Center Administration** box enter the Call Center Administrator password.
The password must be from four to eight numbers long and cannot start with zero.

5 In the **Confirmation** box enter the Call Center Administrator password.

6 Click the **Submit** button.
The Call Center Administrator can log on using this password.



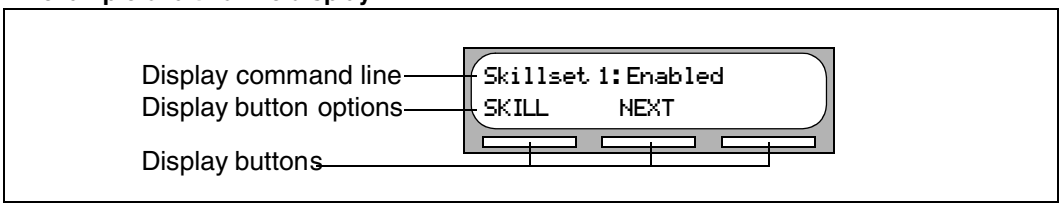
If you create a Call Center Administrator password, the Call Center settings that can be accessed are:

- Agent List
- Add Many Agents
- Skillset List
- General Properties
- Greetings
- Caller Input Rules
- CLID/DNIS Routing Table
- Expected Wait Time (unavailable on CallPilot 100/150.)

Setting up Call Center from a two line display telephone

You cannot use a single line display telephone to set up and administer Call Center on CallPilot 100/150. You must use a two line display telephone. Two line display phones show CallPilot and Call Center commands and options. A two line display can show up to three display options at once. In some instances, an option does not have a corresponding display button, and you must select the option by pressing buttons on the diapad.

An example of a two line display



Call Center agents can use two line display telephones and one line display telephones. Supervisors must use two line display telephones with the handsfree mute feature. Non display telephones, such as telephones attached to an analog terminal adapter, cannot be used for Call Center agent tasks. We recommend that you read the telephone user card for your telephone before proceeding.

Note: If you use a phone to set up Call Center on CallPilot 100/150, you must use a two line display telephone. You can use a phone to set up Call Center only if you use CallPilot 100/150. You cannot use a phone to set up Call Center if you use Business Communications Manager. You can also use CallPilot Manager to set up Call Center.

System timeout

If you pause longer than 2 minutes (120 seconds) when you program Call Center on a two line display telephone, the system times out and ends the session. This is a safety feature that prevents unauthorized use of the system.

If the system times out while you are setting up Call Center, the settings are entered in the system. To continue programming, you must log on again and change the settings.

Using the dialpad

The buttons on your display telephone dialpad act as both numbers and letters. Each button represents a number and letters of the alphabet.

To enter a character	press the dialpad button that represents the letter or number. Press the button again to see the next letter or number.
To accept a character	press # or press another button. When you press another button, the cursor advances and the display shows the first character on the new button.
To delete a character	press the BKSP display button.

Letters and numbers on the dialpad

1 1 ' -	2 A B C 2 a b c	3 D E F 3 d e f
4 G H I 4 g h i	5 J K L 5 j k l	6 M N O 6 m n o
7 P Q R S 7 p q r s	8 T U V 8 t u v	9 W X Y Z 9 w x y z
* Quit	0 Q Z Zero q z	# Accepts the displayed letter enters a comma (,)

The display can show up to 16 characters. The prompt remains on the display if you enter fewer than ten characters. If you enter information where the prompt and the information is fewer than 16 characters, you can see both the prompt and the information you enter.

```
Pswd:1111
OTHR   RETRY   OK
```

This is an example of a display with fewer than 16 characters, where the command line prompt remains on the display.

```
Name:
RETRY   BKSP   OK
```

This display shows the **Name:** command line prompt.

```
P
RETRY   BKSP   OK
```

When you begin to enter the last name, the **Name:** command line prompt disappears. For example, if you enter the name Partridge, you press 7 for P, and the display drops the **Name:** prompt.

```
PARTRIDGE
RETRY   BKSP   OK
```

Although the name is only nine characters long, the command line prompt is not shown on the display after you enter the entire name.

The prompt disappears for these command line prompts:

- Name:
- Log:
- Dest ph:

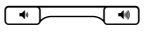
Symbols and conventions used in this guide

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word is in a special font (in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shows bottom line of a two line display telephone)	PLAY	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.

About telephone buttons

This table shows the Nortel Networks Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

Button name	T7100, T7208, T7316	M7100, M7208, M7310, M7324	M7100N, M7208N, M7310N, M7324N
Feature		Feature	
Handsfree	Bottom right-hand button	Handsfree Mute	
Hold		Hold	
Volume Control			
Release		Rls	

You can enter , Feature or and the code to use a feature. For example, press 9 8 1 to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

Checking which telephone mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.
The System Administrator determines which interface is assigned to your mailbox.

Follow the procedures in this guide that apply to the interface you use.
Some procedures apply to both interfaces.

To check which mailbox interface you use

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open your mailbox.

2 Check the display to see which interface you use:

This is the Norstar Voice Mail interface.

This is the CallPilot interface.

3 Press [ ] to end the session.

Chapter 3
Using Feature Codes

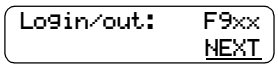
You use Feature Codes to perform Call Center functions on your telephone.

Feature Codes

Feature Codes are assigned during installation. This guide shows the default Feature Codes. Call Center can also use custom Feature Codes. If the default Feature Codes are used by another application, your system automatically assigns custom Feature Codes. If your System Administrator has assigned custom Feature Codes, you can use the table "Feature Codes" on page 252 to record the Custom Feature Codes.

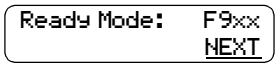
To determine the Feature Codes

1 Press [transfer] [9] [*] [1].



2 The display shows the name and number of the Log In/Log Out Feature Code. xx represents a number between 00 and 99.

3 Press NEXT.



4 The display shows the name and number of the Ready Mode Feature Code.

5 Press NEXT to see more Feature Codes.

6 When the display shows QUIT you have seen all the Feature Codes.

7 Press [end] to end the session.

Programming a memory button with a Feature Code

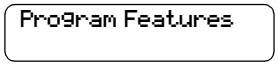
Each Feature Code can be programmed to a memory button. We recommend that you use memory buttons with indicators to program the Feature Codes. A memory button indicator is the triangle next to a memory button.

You can use memory buttons to monitor call activity, and view the Login/Logout and Not Ready status of agents. For information about how the status appears, refer to the *Nortel Networks Call Center Agent Guide*.

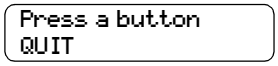
For information about using programmed memory buttons to monitor call activity, refer to "Primary and Secondary alert times" on page 171.

To program a memory button

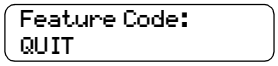
1 Press [✆] [*] [3].
Do not lift your handset.



2 The display shows **Program Features**.



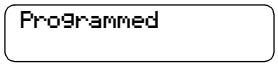
3 Press a memory button with an LCD indicator.



4 Press [✆].

5 Enter the Feature Code number that you want to program.
For example, enter [9] [0] [9] to program the Display Waiting Calls Feature Code. See the tables "Feature Codes used by Call Center agents" on page 32 and "Agent Feature Codes" on page 32 for the Feature Codes.

Repeat steps 1 through 5 for each Feature Code you want to program.



6 The display shows that the button is programmed, and then ends the session.

Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Feature Codes used by Call Center Administrator and Supervisors

Use this Feature Code	To...
Open Mailbox [Feature] 9 8 1	• open skillset mailboxes • record skillset mailbox greetings • listen to messages in the skillset mailbox
Operator Settings [Feature] 9 8 2	• set or change the operator extension • indicate whether the operator is available • select the day and night service modes for skillsets • change the password for Operator Settings For more information on using the Operator Feature Code, refer to "Setting the Service Mode for skillsets" on page 147 and "Resetting the Operator password" on page 241.
Voicemail DN [Feature] 9 8 5	• display the skillset mailbox number (Control DN) for each skillset • display the extension for Message Waiting Indication for the skillset mailbox • reset the passwords of the Call Center Administrator and the operator For information on the Control DN, refer to "Determining a skillset mailbox number" on page 62. For information on resetting the Operator and Call Center Administrator passwords, refer to "Resetting the Operator password" on page 241.
Display Waiting Calls **Skillset Status** [Feature] 9 0 9	• view real-time status information about skillsets. You can see how busy your call center is so that you can adjust skillset staffing • view whether a skillset is enabled or disabled • view the number of agents logged on to the skillset • view the number of calls waiting • view the longest wait time of a call To provide easy, one-button access to the this feature, program a memory button that has an indicator with [Feature] 9 0 9. Refer to "Programming a memory button with a Feature Code" on page 30.
Log on/Log off [Feature] 9 0 4	• log on or off.
Monitor agents [Feature] 9 0 5	• lets you monitor agents
Supervisor Help [Feature] 9 0 6	• lets you take agents' help requests (not available on CallPilot 100/150.)
Not Ready [Feature] 9 0 8	• extend a Break Time period if agents need time after calls to do paperwork or wrap up tasks. For more information about Break Time properties for a skillset, refer to "Break Time" on page 45.

Note: You can use The Log on/Log off and the Not Ready Feature Codes, but they are used primarily by agents. For information on the Feature Codes used by agents, refer to "Feature Codes used by Call Center agents" on page 32.

Note: While you use a feature, if you press the Feature [Feature] button your present feature session ends. Do not press [Feature] unless you want to end your current feature session.

Feature Codes used by Call Center agents

If you have Custom Feature Codes, record them in the table "Feature Codes" on page 252.

Agent Feature Codes

For more information on Agent Feature Codes, refer to the *Nortel Networks Call Center Agent Guide*. For more information on Feature Codes used by supervisors, refer to the "Feature Codes used by Call Center Administrator and Supervisors" on page 31.

Agents use this Feature Code	To...
Open Mailbox [Feature] 9 8 1	• access messages in a skillset mailbox
Log on/Log off **Monitor skillsets** [Feature] 9 0 4	• log on when they are in the office • view the status of the skillsets they are logged on to. Agents can program a memory button with the Log on/Log off Feature Code. The status of the calls waiting in the skillset is shown by the flash rate of the indicator. For more information refer to "Primary and Secondary alert times" on page 171.
Supervisor Help [Feature] 9 0 6	• requests help from a supervisor (not available on CallPilot 100/150)
Activity Codes [Feature] 9 0 7	• start a session where they can enter Activity Codes • For more information about Activity Codes see "Activity Codes" on page 193.
Not Ready [Feature] 9 0 8	• activate or cancel the Not Ready feature on their telephone. If the work resulting from a call requires extra time to complete, an agent can use the Not Ready Feature Code to prevent Call Center from routing another call to them. If an agent makes a phone call, or if a supervisor is monitoring a call, they first use the Not Ready Feature Code to make themselves busy. When the agent is ready to receive calls, they use this Feature Code to cancel the Not Ready feature and receive calls again. • If an agent does not answer a call within a certain number of rings, the call is returned to the skillset and the agent telephone is automatically placed into Auto Busy Mode or Auto Logout Mode. The agent must manually cancel the Auto Busy Mode feature by using the Not Ready Feature Code to continue to receive calls.
Display Waiting Calls [Feature] 9 0 9	• Agents who answer calls only during peak call periods can use Display Waiting Calls to see which skillsets have the most call activity.

Note: While you are using a feature, if you press the Feature [Feature] button your present feature session ends. Do not press [Feature] unless you want to end your current feature session.

Chapter 4
Setting up Call Center agents

Agents handle the calls in your call center. Supervisors are agents with additional capabilities. Supervisors can change their own password and monitor calls between agents and callers.

About adding agents

Before you can add agents to your Call Center you must purchase and enable a Software Authorization Code for the number of agents that you want to add. The number of agents you can add to your call center is determined by the number of agents the Software Authorization Code enables. For how to enable a Software Authorization Code refer to"Enabling Software Authorization Codes" on page 20.

For more information about Call Center agents, refer to the *Nortel Networks Call Center Agent Guide*.

Agent properties

Agent ID	Each agent is assigned a unique ID number. Call Center assigns the lowest available ID number. You can assign a different ID number. Statistics are collected and reported for each ID number. For more information on statistics, refer to "Monitoring call activity" on page 179 and refer to the *Nortel Networks Call Center Reporting Set Up and Operation Guide*. Agent ID is based on whether you use Basic or Professional Call Center, and whether you use a CallPilot 100/150 or Business Communications Manager.
Name	The agent name can be a maximum of 13 characters. If you do not enter a name, a default agent name appears as the word *Agent* and the ID number, for example, *Agent12*. Do not create agent names that have the same first seven characters. If you use Call Center Reporting, it truncates the agent name after the first seven characters and your agent names appear identical.
Supervisor	Super represents the status of the agent. No in the Super column means that an agent that does not have supervisor status. Yes in the Super column means that an agent has supervisor status.
Automatic Answer	Automatic Answer is optional. Select Automatic Answer if you want to force-deliver calls to an agent. If Automatic Answer is enabled, the agent hears a tone on their telephone and headset that indicates that a call is delivered. The agent is automatically in the handsfree mode. It is important that agents use the Not Ready feature when they are not available to receive calls. If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must answer calls manually. **NOTE**: For how to use Automatic Answer with the telephones you use in your Call Center see "Automatic Answer" on page 244.

Missed Call Option	The Missed Call Option controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call. The default is Make Not Ready (Return to Skillset). To assign how many rings before the Missed Call Option, change the timer for Transfer Callback Timeout. • If you use a Business Communications Manager system, refer to "Timers" section of the "Configuring System Settings" chapter of the *Business Communications Manager Programming Operations Guide*. • If you use a CallPilot system, refer to the *Norstar System Coordinator Guide.*
Accepted Call Types	Accepted Call Types are Voice calls only, Multimedia calls only, or both. If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear. For more information on Multimedia Call Center refer to the *Multimedia Call Center Set Up and Operation Guide.*
Priority	If you use Basic Call Center, assign a priority to the agent. If the method of call distribution for the skillset is Preferred, the agent with the highest priority receives the call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10. For more information about method of call distribution refer to "Method" on page 44.
Activity Code Entry Type	Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes. Optional is the default. For more information about Activity Codes see "Activity Codes" on page 193.

In addition to these agent properties, if you use Professional Call Center you can assign agents Dynamic Priority when you assign them to a skillset. For more information refer to "Dynamic Agent Priority" on page 54.

Adding an agent or a supervisor

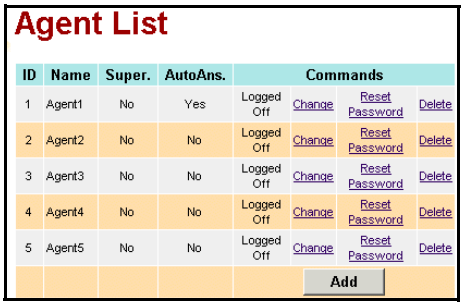
You can use the table "Call Center agents" on page 256 to record the agents you add.

To add an agent

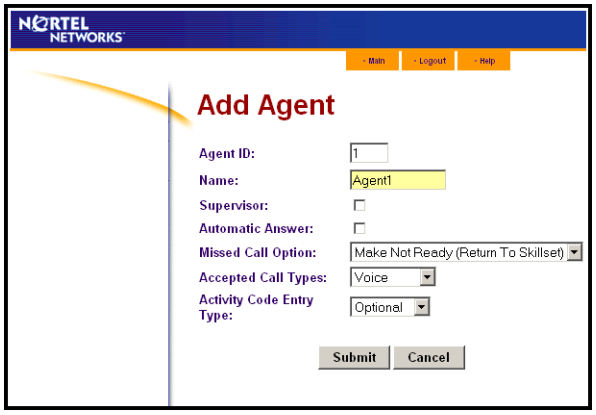
1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Agent List** link.
The Call Center Agent List appears.


Agent List
ID
Name
Super.
AutoAns.
Commands
1 Agent1 No Yes Logged Off Change Reset Password Delete
2 Agent2 No No Logged Off Change Reset Password Delete
3 Agent3 No No Logged Off Change Reset Password Delete
4 Agent4 No No Logged Off Change Reset Password Delete
5 Agent5 No No Logged Off Change Reset Password Delete
Add

4 Click the **Add** button.
The Add Agent page appears.



5 If you want to change the Agent ID number, in the **Agent ID** box type the new Agent ID.

6 In the **Name** box type the name of the agent.
Do not use the same first seven characters for an agent name. For more information about agent names refer to "Name" on page 33.

7 Select the **Supervisor** check box if you want to give the agent supervisor functionality.
The default is not selected.

8 Select the **Automatic Answer** check box if you want calls to be force-delivered to the agent.
The default is not selected.

9. From the **Missed Call Option** list box select Make Not Ready (Return to Skillset) or Automatic Logout.
10. From the **Accepted Call Types** list box select Voice, Multimedia or Both.
    If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear.
11. If you use Basic Call Center, from the **Priority** list box select a priority for the agent.
12. If you use Activity Codes, from the Activity Code Entry Type list box select Optional or Prompted. The default is Optional.
13. Click the **Submit** button.

Adding more than one agent

You can save time by adding more than one agent at a time. When you add multiple agents, the agents have the default agent name and parameters.

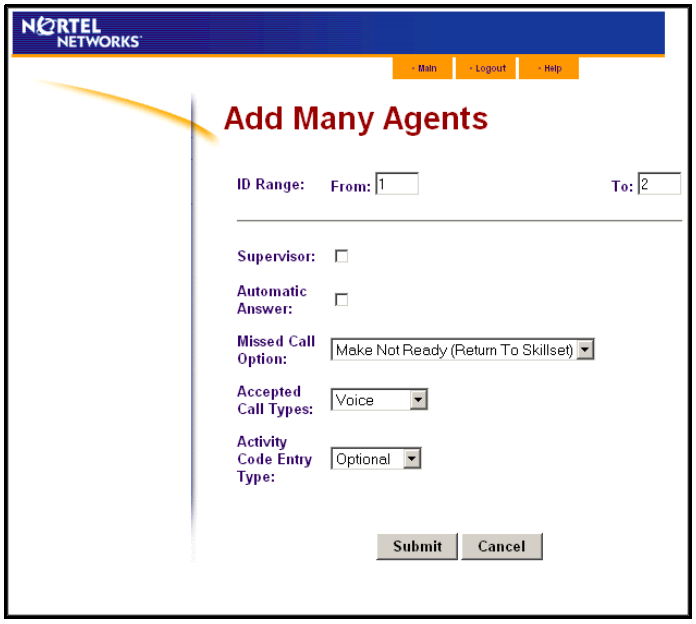
You can use the table "Call Center agents" on page 256 to record the agents you add.

To add more than one agent

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Add Many Agents** link.
The Add Many Agents page appears.



4 In the **From** box type the lowest agent ID number of the agents you want to create.

5 In the **To** box type the highest agent ID number of the agents you want to create.
The Agent ID numbers you enter must be between 1 and 250.

6 Select the **Supervisor** check box if you want the agents to have Supervisor status.

7 Select the **Automatic Answer** check box if you want calls to be force-delivered to the agents.

8 From the **Missed Call Option** list box select **Make Not Ready (Return to Skillset)** or **Automatic Logout**.

9 From the **Accepted Call Types** list box select Voice, Multimedia or Both.
If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear.

10 If you use Basic Call Center, from the **Priority** list box select a priority from 1 to 20 for the agent.

11 If you use Activity Codes, from the **Activity Code Entry Type** list box select **Prompted** or **Optional**. The default is Optional.

12 Click the **Submit** button.

Note: Any agents who have an agent ID number that is between the numbers you enter in the From and To boxes are not changed. These agents are not included in the number of agents added.

Changing agent information

You can change an agent's:

- name
- supervisor status
- Automatic Answer setting
- Missed Call Option
- Accepted Call Types
- Activity Code setting

Note: You cannot change the properties of an agent who is logged on. Ask the agent to log off and then make the changes.

To change agent information

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Change** link for the agent you want to change.
   The Change Agent page appears.
   If the agent if logged on, a message appears that says that the agent must log off first.
5. Change the properties that you want to change for the agent.
6. Click the **Submit** button.
   Repeat steps 4 and 5 for each agent you want to change.

Resetting an agent's password

If an agent forgets their password, you can reset the password back to the default value (0000). After you reset the password, the agent must change their password the next time they log on.

To reset an agent's password

1. Log on to CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Reset Password** link for the agent whose password you want to reset.
   A message appears that asks you to confirm the request to reset the password.
5. Click the **OK** button.
   A message appears that the agent's password is reset. The agent password is set to 0000.
6. Click the **OK** button.

Deleting an agent

Deleting an agent removes the agent from Call Center. The agent is removed from the Agent List and all the skillsets they are assigned to.

If you want to remove an agent from a skillset, refer to "Unassiging an agent from a skillset" on page 57.

Note: You cannot delete an agent who is logged on. Ask the agent to log off and then delete them.

To delete an agent

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Delete** link for the agent you want to delete.
   A message appears that asks you to confirm the deletion.
   If the agent you want to delete is logged on, the Delete button is not available.
   If the agent you want to delete has logged on while you are deleting them, a message appears that says that the agent must log off before you can delete them.
5. Click the **OK** button.
   A message appears that says the agent is deleted.
6. Click the **OK** button.

Forcing an agent off

Agents usually log out when they are no longer available to receive calls. If an agent leaves and does not log off, you can force the agent off. An agent that is forced off does not receive any new Call Center calls.

To force an agent off

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Agent List** link.
   The Agent List page appears.
4. Click the **Force Off** link for the agent you want to log off.
   A message appears that asks you to confirm the request to force off the agent.
5. Click the **OK** button.
   A message appears that says the agent is logged off.
6. Click the **OK** button.
7. To log the agent off, click the **OK** button.
   The agent status changes to Logged Off on the Agent List page.

Note: If the agent you force off is on a call, the call is not interrupted.

Chapter 5
Setting up skillsets

About skillsets

Call Center skillsets answer and distribute calls to agents as they become available. Skillsets hold calls for different call center departments, such as sales and technical support.

The maximum number of skillsets you can set up depends on whether you have Basic or Professional Call Center, and whether you use the CallPilot 100/150 or Business Communications Manager system. For more information refer to "Number of skillsets" on page 15.

You cannot change the properties of a skillset while it is in use. For more information, refer to "Skillset properties" on page 44 and "Configuring lines" on page 166.

How incoming calls are sent to a skillset

Incoming calls are sent to a skillset in one of the following ways:

- You assign a line to be answered directly by a skillset. For information about assigning lines refer to "Line administration" on page 165.
- A receptionist, agent or subscriber receives a call and transfers the call to a skillset. They can transfer the call to a skillset by pressing [e] [7] [0] or TRANSFER and entering the CDN of the skillset. The receptionist, agent or subscriber must not use the Call Pickup feature.
- The Automated Attendant or a CCR Tree answers the call and the caller makes a selection that routes them to the CDN of the skillset. For more information, refer to "Auto Attendant" on page 14 and "Custom Call Routing (CCR)" on page 14.
- Calls can be forwarded to the CallPilot extension of the skillset by Call Forward All Calls (CFAC), Call Forward No Answer (CFNA) or Call Forward On Busy (CFB). For information about these features, refer to the *Business Communications Manager Programming Operations Guide* or the *Norstar System Coordinator Guide*.

Note: Agents are restricted in how they can use CFAC, CFNA and CFB. For more information refer to "Important considerations about how agents use features" on page 243.

Skillset properties

Skillset	The number between 1 and 50 that is assigned to the skillset.
Control DN	The Control Directory Number is the extension associated with the skillset. Incoming calls transfer to the CDN of each skillset from extensions, the Automated Attendant or Custom Call Routing. The CDN is the skillset mailbox number. If you have a new Business Communications Manager system, you must use B1 DNs (extensions). A B1 extension number is the extension number that you dial to call a telephone or peripheral. You can use B2 DNs (extensions) on Business Communications Manager systems only if you have upgraded your system. A B2 extension is a spare extension. If you use Interactive Voice Response or any other application that uses Auto Assign, you must delete any Call Center CDNs before you install the other applications. After you install the applications you must set up the Call Center CDNs again. For more information about using B1 and B2s see “Using B1 and B2 DNs” on page 214.
Name	The skillset name is displayed: • on Call Center displays to identify the skillset • in reports • as the skillset mailbox name The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to *SKILLn* where *n* is the skillset number. The name for each skillset is the same as the skillset mailbox name.
MWI DN (Message Waiting Indication extension)	The Message Waiting Indication extension is an optional phone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the telephone display when there are new messages in the skillset mailbox. The MWI DN defaults to None. If you forget the MWI extensions for a skillset mailbox, you can view the MWI extensions by using the procedure “Determining a skillset mailbox number” on page 62.
Method (Method of Call Distribution)	The method of call distribution determines to which of several available agents to route the call. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes the call to the agent who has been available the longest. Preferred routes the call to the agent with the highest priority (best qualified agent is 1). If there are several agents with the highest priority, the agent available longest with that priority will be selected. The default method of call distribution is Least Busy. If you use Call Center Professional you can assign agents different priorities depending on the skillsets they belong to. For more information refer to “Dynamic Agent Priority” on page 54.

Break Time	Break Time is a time period for agents to complete paperwork after they finish a call. After an agent completes a call, they are taken out of the skillset for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code. For more information, refer to "Not Ready" on page 31. The Break Time period can last from 00:00 to 59:59. The Break Time defaults is 00:30 seconds. You can change the Break Time period to 00:00 if an agent does not need a Break Time. If your Call Center uses Activity Codes, set the Break Time to longer than 10 seconds to allow time for Activity Code entry.
Delay Answer	Delay Answer is a toll-saving feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a call comes in on a line belonging to a skillset that has no free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever happens first. During the Delay Answer time, the waiting callers hear ringback. To activate the Delay Answer feature, enter a time for Delay Answer. The Delay Answer time can be a minimum of zero seconds and a maximum of 10 minutes. The default Delay Answer time is 00:00.
Attendant extension	The attendant extension is the extension used if a caller requests to talk to the operator after the caller transfers to the Automated Attendant or CCR. The attendant extension is optional. If you do not assign an attendant extension, the call is sent to the system attendant extension. If a call is transferred to an Auto Attendant greeting table, the call is sent to the greeting table attendant.
Language preference	Language preference can be either Primary or Alternate. The language preference is the language choice used for prompting callers who transfer to the Automated Attendant or CCR. Language preference appears only on a system that is configured as bilingual.
Use previous _ calls to calculate EWT	You can enter a number between 2 and 256 calls. For more information about Expected Wait Time see "Expected Wait Time" on page 129.
EWT Increase Allowed	Selected by default, which means that EWT will be recalculated if it increases, and the appropriate EWT greeting will be played. For more information about Expected Wait Time see "Expected Wait Time" on page 129.
Initial Call Duration	The Initial Call Duration is used to compute expected wait time until sufficient call statistics are obtained. This can be a value between 00:01:00 and 24:00:00. For more information about Expected Wait Time see "Expected Wait Time" on page 129.
Activity Code Entry Type	Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes. Optional is the default. For more information about Activity Codes see "Activity Codes" on page 193.

Setting up or changing a skillset

You can record skillset properties in the table "Call Center skillsets" on page 253.

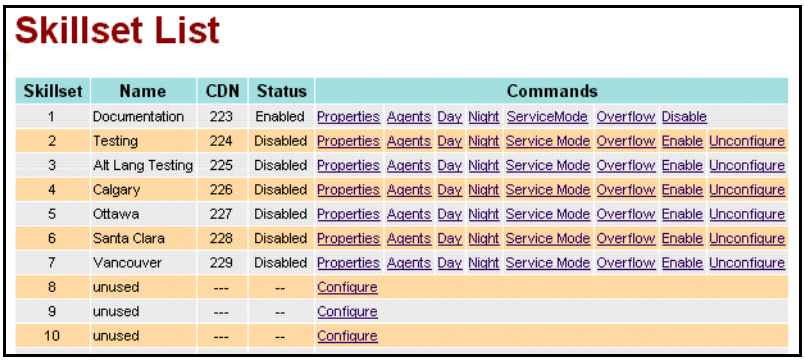
Note: Before you can change a skillset you must disable the skillset and wait until there are no calls in the skillset. You cannot change a skillset while it is in use.

To set up or change a skillset

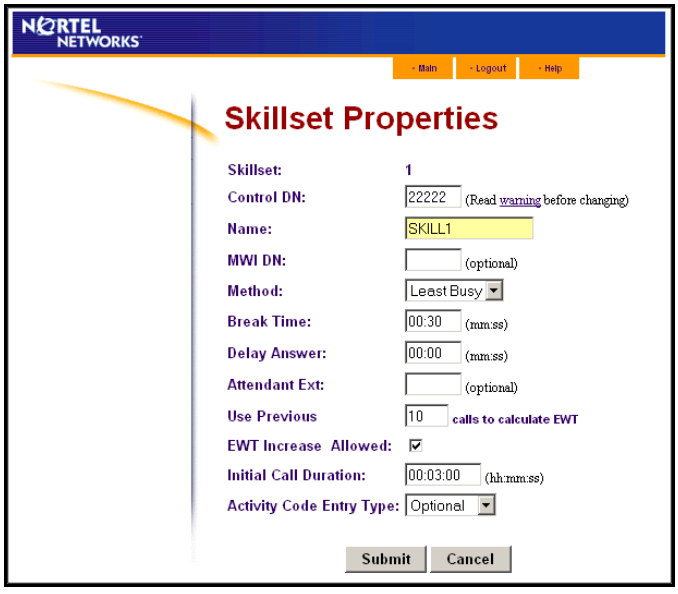
1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.


Skillset List
Skillset Name CDN Status Commands
1 Documentation 223 Enabled Properties Agents Day Night ServiceMode Overflow Disable
2 Testing 224 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
3 Alt Lang Testing 225 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
4 Calgary 226 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
5 Ottawa 227 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
6 Santa Clara 228 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
7 Vancouver 229 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
8 unused --- -- Configure
9 unused --- -- Configure
10 unused --- -- Configure

4 If you want to set up a skillset, click the **Configure** link for the skillset you want to set up
or
if you want to change a skillset, click the **Properties** link for the skillset you want to change.
The Skillset Properties page appears.



5 In the **Control DN** box, type the extension for the skillset.
For more information, refer to "Control DN" on page 44.

6 In the **Name** box type the name for this skillset. The skillset name can be a maximum of 16 characters.

7 In the **MWI DN** box, type the extension of the telephone that you want to display the Message Waiting Indicator for the Skillset Mailbox.

8 From the **Method** list box, select Least Busy or Preferred.
The default is Least Busy.

9 In the **Break Time** box enter the Break Time period.
The default Break Time is 00:30.

10 In the **Delay Answer** box enter the delay answer time.
The default delay answer time is 00:00.

11 If you want to assign an attendant to the skillset, in the **Attendant Ext** box type the extension of the attendant.

12 If your system is configured for bilingual operation, from the **Prompt Language** list box, select Primary or Alternate. The Prompt Language list box does not appear if you do not use bilingual operation. For more information on bilingual operation refer to "Assigning the Call Center language" on page 169.

13 If you use Expected Wait Time (EWT), enter the number of calls you want to use to calculate EWT in the **Use Previous ___ calls to calculate EWT** box. This is the number of previous calls that are used to calculate the average call duration of a skillset. The number can range from 2 to 256. The default is 10. For more information about EWT refer to "Expected Wait Time" on page 129.

14 If you use Expected Wait Time, leave the **EWT Increase Allowed** check box selected if you want the system to recalculate the EWT if it increases and continue to play the appropriate EWT greeting. If you clear the check box, callers will not hear recalculated expected wait times if the wait time increases. Whether you select the check box or not, callers will hear the appropriate EWT greeting if the wait time decreases.

15 If you use Expected Wait Time, in the **Initial Call Duration** box enter in hh:mm:ss format the initial average call duration that is used to compute EWT. The average call duration is updated whenever a call is released from an agent. The default is 00:03:00.

16 If you use Activity Codes, from the **Activity Code Entry Type** list box select **Prompted** or **Optional**. The default is optional. For more information about Activity Codes refer to "Activity Codes" on page 193.

17 Click the **Submit** button.
A message appears that says a new mailbox is created, and that you must initialize it before you enable the skillset. For how to initialize a mailbox refer to "Initializing a skillset mailbox" on page 63.

18 Click the **OK** button.

Setting up DID routing

You can route calls based on their Direct Inward Dialing (DID) number. DID is the ability to make a telephone call directly into an internal extension, without having to go through the operator.

To route DID calls, set up a DID target line and assign the target line to a skillset.

To set up DID routing for Business Communications Manager

1. In Unified Manager, set up a DID target line.
   For information about setting up a DID target line refer to the *Business Communications Manager Programming Operations Guide*.
2. In CallPilot Manager, configure the target line number to be answered by Call Center.
   For information about configuring lines refer to "Configuring lines" on page 166.

To set up DID routing for CallPilot 100/150

1. From a Norstar phone, set up a DID target line.
   For information about setting up a DID target line refer to the *Norstar System Coordinator Guide.*
2. In CallPilot Manager, configure the target line number to be answered by Call Center.
   For information about configuring lines refer to "Configuring lines" on page 166.s

Setting up CLID/DNIS Routing

If you use Professional Call Center you can set up CLID/DNIS Routing Tables. CLID/DNIS Routing is the initial routing that Call Center calls encounter. The CLID/DNIS Routing you set up lets Call Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from. Your CLID/DNIS Routing Table can have a maximum of 1000 entries.

Examples of using CLID/DNIS Routing

Routing using CLID/ANI

If your company has preferred customers or customers who have access to special services, you can set up CLID/ANI routing that recognizes the phone numbers the customers are calling from. Customers whose phone numbers are recognized are immediately routed to appropriate skillsets. The callers do not need to enter additional digits to route their calls.

Routing using DNIS

If your company has a customer who is a purchasing agent who frequently contacts a sales line, you can set up DNIS routing that recognizes the phone number the customer is calling. Customers who call the sales directory numbers are immediately routed to sales skillsets.

Routing using Multimedia Call Center

If your company has Multimedia Call Center enabled, callers can click an HTML icon and enter the phone number they want an agent to call them at. Calls that arrive from a multimedia call are recognized as Multimedia Call Center calls and routed to the appropriate skillsets. You can set up CLID/ANI rules for Multimedia Call Center Calls. The phone number that the caller enters in the web browser is the phone number that Multimedia Call Center dials when an agent receives the call.

Routing using a Line

If your company uses a rotary number without DNIS capability that uses lines 1 to 3, you can set up routing to send calls that come in on these lines to a specific skillset.

Routing using CLID and a Line

If your company uses a rotary number and subscribes to a CLID service, you can set up routing based on CLID and Line to route a special customer.

Routing using CLID/ANI and DNIS

If your company has customers who call the sales group or the service group frequently, you can set up routing based on CLID/ANI and DNIS to quickly route these customers. You can route the customers to a skillset with agents that specialize in service or sales to these customers.

CLID/DNIS Routing Table properties

Line	The line is the line number the call comes in on. Any calls that arrive on this line are assigned the routing you select. The line number you enter must be a line that is configured to be answered by a skillset.
CLID/ANI	The CLID (Calling Line Identification) or ANI (Automatic Number Identification) number identifies the caller or the location the call was made from. Any calls that have this CLID or ANI number are assigned the priority from 1-20 that you select. If a call matches the CLID/ANI information in the routing table, the call is routed to the skillset you choose. You can change the priority, from 1-20, of the call in the skillset that is assigned for the line the call comes in on.
DNIS	DNIS (Dialed Number Identification Service) sends a call directly to an internal extension without going through the operator. A DNIS number identifies the number the call is made to. If a call matches the DNIS information in the routing table, the call is routed to the skillset you choose. You can change the priority of the call in the skillset that is assigned for the line the call comes in on.
Multimedia Calls	Select the Multimedia Calls check box if you want Multimedia Call Center calls assigned to this route. You must use Business Communications Manager and have Multimedia Call Center enabled. Incoming Multimedia Call Center calls are assigned the Priority you select. If you select the Multimedia Calls check box, you must leave the Line box and the DNIS box blank.
Action	The action is the treatment that is applied to the call: • You can move the call to another skillset • You can change the priority of the call from 1-20 • You can move the call to another skillset and change the priority of the call

Note: The CLID routing table can support 1000 rules.

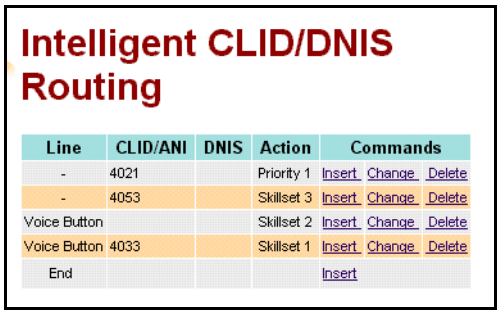
Each rule can be a number, or a range, such as 416*.

Adding a CLID/DNIS Route

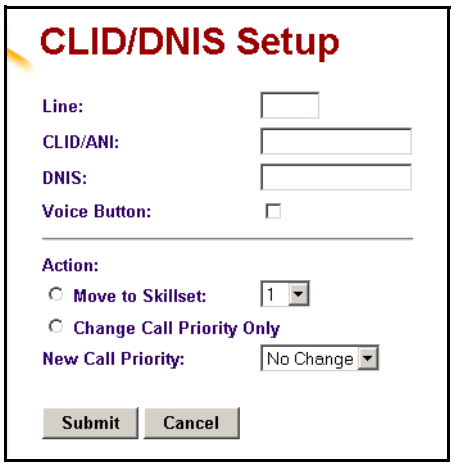
1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.



4 Click the **Insert** link.
The CLID/DNIS Setup page appears.



5 Set the method to identify the call:

- If you want to create a rule based on the line a call comes in on, in the **Line** box enter the line number.
- If you want to create a CLID or ANI rule, in the **CLID/ANI** box type the CLID or ANI number you want to assign this routing to. The CLID or ANI number identifies the caller or the location the call was made from.
- If you want to create a DNIS rule in the **DNIS** box type the DNIS number you want to assign to this route. The DNIS number identifies the number the call is made to.
- If you want to create a rule for CLID/ANI and a rotary number, in the **CLID/ANI** box type the CLID or ANI number and in the **Line** box type the line number
- If you want to create a rule for CLID/ANI and DNIS, in the **CLID/ANI** box type the CLID or ANI number and in the **DNIS** box type the DNIS number

- If you have Multimedia Call Center enabled and you want to assign routing to Multimedia Call Center calls, select the **Multimedia Calls** check box. If you select the Multimedia Calls check box, you can enter a CLID/ANI number, but you must leave the Line box and the DNIS box blank.

6 Select the type of routing you want to apply to the call:

- if you want to move the call to another skillset, select **Move to Skillset** and from the **Skillset** list box select the number of the skillset you want to route the call to
- if you want to move the call to another skillset and assign it a different priority:
  - select **Move to Skillset**
  - from the **Skillset** list box select the number of the skillset you want to route the call to
  - from the **New Call Priority** list box select a priority from 1-20 for the call
- if you want to change the priority of the call, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority from 1-20 for the call

7 Click the **Submit** button.

Changing a CLID/DNIS Route

You can change the type of routing that applies to a CLID/DNIS call. If you want to change the type of call the routing applies to, you must create a new route in the CLID/DNIS Routing Table.

To change a CLID/DNIS Route

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.

4 Click the **Change** link for the route you want to change.
The CLID/DNIS Setup page appears for the route.

5 Select the type of routing you want to apply to the call:

- If you want to move the call to another skillset, select **Move to Skillset** and from the **Skillset** list box select the number of the skillset you want to route the call to.
- If you want to move the call to another skillset and assign it a different priority:
  - Select **Move to Skillset**.
  - From the **Skillset** list box select the number of the skillset you want to route the call to.
  - From the **New Call Priority** list box select a priority from 1-20 for the call.
- If you want to change the priority of the call, select **Change Call Priority Only**, and from the **New Call Priority** list box select a priority from 1-20 for the call.

6 Click the **Submit** button.

Deleting a CLID/DNIS Route

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **CLID/DNIS Routing Table** link.
   The Intelligent CLID/DNIS Routing page appears.
4. Click the **Delete** link for the route you want to delete.
   The routing is removed from the CLID/DNIS Routing Table.

Assigning an agent to a skillset

You can assign an agent to one or more skillsets. Each agent is responsible for answering calls for the skillsets they are assigned to.

Note: Before you can add an agent to a skillset, the skillset must be disabled. For how to disable a skillset see "Disabling a skillset" on page 59.

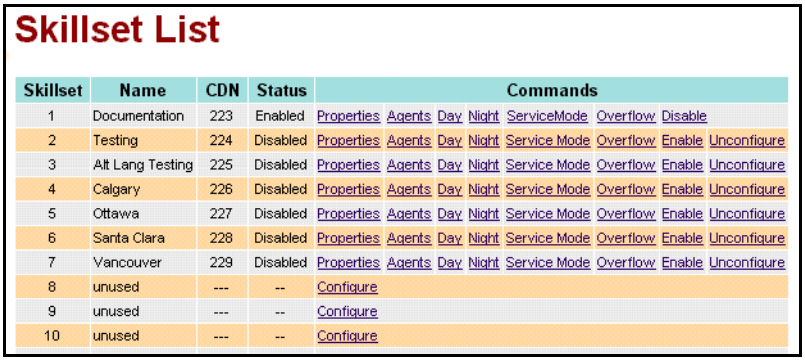
Dynamic Agent Priority

If you use Call Center Professional on Business Communications Manager, agents can have different priorities depending upon which skillset they are logged on to. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

If the method of call distribution for the skillset is Preferred, the agent with the highest priority receives the call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10. For more information about method of call distribution refer to "Method" on page 44.

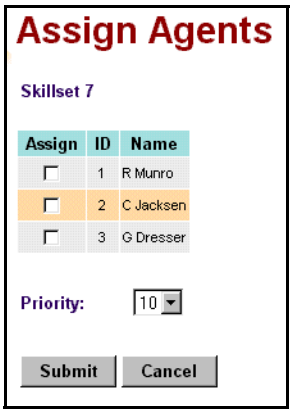
To assign an agent to a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.


Skillset List
Skillset
Name
CDN
Status
Commands
1 Documentation 223 Enabled Properties Agents Day Night ServiceMode Overflow Disable
2 Testing 224 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
3 Alt Lang Testing 225 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
4 Calgary 226 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
5 Ottawa 227 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
6 Santa Clara 228 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
7 Vancouver 229 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
8 unused --- -- Configure
9 unused --- -- Configure
10 unused --- -- Configure

4. Click the **Agents** link for the skillset that you want to add agents to.
   The skillset must be configured before the Agents link appears.
   The Assigned Agents page appears.

5 Click the **Assign** button.
The Assign Agents page appears with the available agents displayed.



6 Click the **Assign** check box for each agent that you want to add to the skillset.

7 If you use Professional Call Center, from the **Priority** list box, select the Priority of the agent. 1 is the highest priority.

8 Click the **Submit** button.
The agent you selected appears on to the Assigned Agents page.
If you want to assign another agent to this skillset, follow steps 5 through 8.

9 Click the **Close** button to return to the Skillset List page.

Changing an agent's priority in a skillset

If you use Call Center Professional on Business Communications Manager, agents can have different priorities depending upon which skillset they are logged on to. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

Before you can change an agent's priority:

- the skillset must be disabled. See "Disabling a skillset" on page 59.
- the agent must be logged off. See "Forcing an agent off" on page 41.

To change an agent's priority in a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to change the agent priority of.
   The Assigned Agents page appears.
5. Click the **Change** button.
   The Change Agent Priorities page appears.
6. Click the **Change** check box for the agent whose priority you want to change.
   You can select more than one agent if you want to assign them the same priority.
7. From the **Priority** list box select the priority you want to assign.
8. Click the **Submit** button.
   The Assigned Agents page shows the new priority.
   Repeat steps 5 through 8 for each agent you want to change.

Unassiging an agent from a skillset

When you unassign an agent from a skillset, the agent is removed from the skillset but is not deleted from Call Center.

Before you unassign an agent from a skillset, you must disable the skillset. See "Disabling a skillset" on page 59.

If you want to delete an agent from Call Center, refer to "Deleting an agent" on page 40.
If you want to log an agent off, refer to "Forcing an agent off" on page 41.

To unassign an agent from a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to unassign an agent from.
   The Assigned Agents page appears.
5. Click the **Unassign** link for the agent you want to remove.
   A message appears that asks you to confirm your request to unassign the agent.

Note: If the agent you are unassigning is logged on, a message appears that says the agent is logged on and asks you to force the agent off or ask them to log off.

To unassign the agent, click the OK button.

6. Click the **OK** button.
   The agent is removed from the Assigned Agents page.
7. Click the **Close** button to return to the Skillset List page.

Viewing agents in a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Agents** link for the skillset you want to view.
   The agents who are assigned to the skillset appear on the Assigned Agents page.
5. Click the **Close** button to return to the Skillset List page.

Note: For information about monitoring agents and skillsets, refer to "Monitoring Call Center call activity" on page 179.

Enabling a skillset

After you set up a skillset, the skillset is disabled until you enable it.

Before you can enable a skillset you must:

- set up the skillset with a valid Control DN.
  For information, refer to "Setting up or changing a skillset" on page 46.
- initialize the skillset mailbox.
  For information, refer to "Initializing a skillset mailbox" on page 63.
- record skillset mailbox greetings.
  For information, refer to "Recording skillset mailbox greetings" on page 68.
- set up the Day and Night Routing Tables.
  For information, refer to "Example of a Day Routing Table" on page 149.

To enable a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Enable** link for the skillset to you want to enable.
   On the Skillset List page in the Status column the skillset changes from Disabled to Enabled.
   A message appears that says what Service Mode the skillset is in.

Note: After you enable a skillset it is automatically in 24 hour mode. To change the Service Mode of a skillset, refer to "Setting the Service Mode for skillsets" on page 147.

Disabling a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines.

If you disable a skillset, no new calls go to the skillset. Any calls that are in the skillset get distributed until the calls are ended.

To disable a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Disable** link for the skillset you want to disable.
   A message appears that asks you to confirm the request to disable the skillset.
5. Click the **OK** button.
   On the Skillset List page in the Status column the skillset changes from Enabled to Disabled.

Unconfiguring a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines. Before you unconfigure a skillset:

1 disable the skillset by following the procedure "Disabling a skillset" on page 59

2 unassign any lines that are assigned to it by following the procedure "Configuring lines" on page 166.

Warning: If you unconfigure a skillset, you delete the skillset properties and the programming for the skillset. This includes the general properties, the assigned agents and the routing table information.

To unconfigure a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Unconfigure** link for the skillset you want to unconfigure.
A message appears that asks you to confirm the request to unconfigure the skillset.

5 Click the **OK** button.
The programming for the skillset is removed from the Skillset List page.

Chapter 6
Setting up skillset mailboxes

About skillset mailboxes

Each skillset has a mailbox that stores messages left by callers. A skillset mailbox is created automatically when you set up a skillset. There is one skillset mailbox for each skillset. The skillset mailbox number is the same as the Control Directory Number (CDN) of the skillset.

Skillset mailboxes have these Class of Service settings:

- they use the primary prompt language
- their maximum message time is 15 minutes
- their maximum message length is three minutes
- their maximum message retention is 30 days
- they have a maximum greeting length of one minute

The default Class of Service for skillset mailboxes is 1.

To prepare a skillset mailbox to receive messages:

- know the skillset mailbox number (CDN) of each skillset mailbox.
  If you do not know the skillset mailbox number, refer to "Determining a skillset mailbox number" on page 62
- initialize the skillset mailbox
- record the skillset mailbox greetings

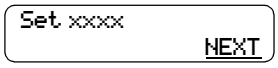
You can use the table "Skillset mailboxes" on page 258 to record the skillset mailboxes you set up.

Determining a skillset mailbox number

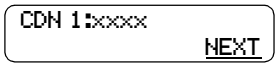
You must know a skillset mailbox number before you can set up the skillset mailbox. The skillset mailbox number is the mailbox's Control DN. If you know the skillset mailbox number, you can initialize the mailbox. Refer to "Initializing a skillset mailbox" on page 63.

To determine a skillset's mailbox number and Message Waiting Indication telephone

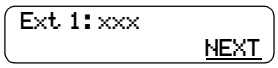
1 Press [✆] [9] [8] [5].



2 Press NEXT.



3 The skillset mailbox number for skillset 1 is displayed.
If None appears the skillset is not configured.
Press NEXT to continue.



4 The Message Waiting Indication (MWI) extension is displayed.
If there are messages in the skillset 1 mailbox, MWI appears at this extension. You assign the MWI extension when you set up the skillset. If Unavail appears you have not set up an MWI extension.

5 Press next to view the skillset mailbox number and MWI extension for each skillset.

6 Press [☎] to end the session.

Initializing a skillset mailbox

You must initialize a skillset mailbox before you can retrieve or listen to messages that are left in it.

Choose a password for the skillset mailbox that is between four to eight digits long and does not start with zero. Give the skillset mailbox passwords to the agents who are responsible for retrieving messages.

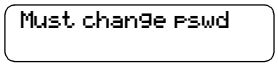
Initializing a skillset mailbox involves:

- choosing a password from four to eight digits long that does not start with zero
- changing the skillset mailbox default password to the new password
- recording the skillset mailbox name in the Company Directory

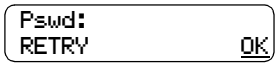
To initialize a skillset mailbox

1 Press [Transfer] [9] [8] [1].

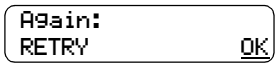
2 Log on by following the voice prompts.
Use the skillset mailbox number and [0] [0] [0] [0], the default password.



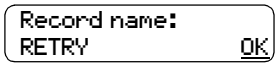
3 This display appears briefly to indicate that you must change the password.



4 Enter a new skillset mailbox password from four to eight digits long that does not start with zero.
Press OK or [#].

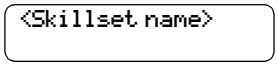


5 Reenter the skillset mailbox password and press OK or [#].



6 At the tone, record the skillset mailbox name in the Company Directory. Do not use handsfree.
Include the skillset mailbox number in the recording, For example, "Sales, mailbox 5813."
Press OK or [#] to end the recording.

7 Press OK or [#] to accept the recording
or
press PLAY or [1] to listen to the recording
or
press RETRY or [2] to re-record your name.



8 The recorded name plays and the skillset mailbox name is displayed. The skillset mailbox name is the name you entered when you set up the skillset properties.

9 Press [End] to end the session.

Opening a skillset mailbox

You can open an initialized skillset mailbox from:

- your extension
- another extension
- an outside tone dial telephone

To open a skillset mailbox - Norstar Voice Mail

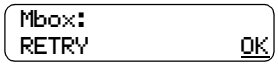
1 Press [Feature] 9 8 1.

2 Enter the skillset mailbox password and press OK or #
or
if you are at another extension, or if you are using a Guest mailbox, press OTHR or * to display the Log: prompt. When this prompt appears, enter the skillset mailbox number and password.

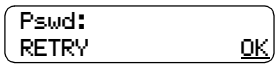
3 After you open the skillset mailbox, the telephone display shows how many new and saved messages are in the mailbox.

To open a skillset mailbox - CallPilot

1 Press [Feature] 9 8 1.



2 Press #
or
if you are at another extension, enter the skillset mailbox number and then press OK or #.



3 Enter the skillset mailbox password and press OK or #.

Opening a skillset mailbox remotely

To open a skillset mailbox from an outside telephone

- If a skillset mailbox is a Mailbox node in a CCR Tree, press the one digit number and you automatically transfer to the skillset mailbox

  or

- Call an Operator, receptionist or subscriber and ask them to transfer you to the skillset mailbox number using [9] [8] [6]
- After you reach the skillset mailbox, press [*] [*] during the greeting to open the skillset mailbox. If you are in Europe or Australia press [8] [8].
- At the voice prompt, enter the skillset mailbox number and password and press [#]. Follow the voice prompts.

To open a skillset mailbox directly from an outside telephone

Follow either procedure to open a skillset mailbox remotely.

1. Call a telephone line that is answered by the Automated Attendant.
2. Press [*] [*] during the Automated Attendant Menu prompt.
   If you are in Europe or Australia press [8] [8].
3. Enter the skillset mailbox number and password, and then press [#].
4. Follow the voice prompts.

   or

1. Call your own extension number.
2. Press [*] [*] during your personal greeting.
   If you are in Europe or Australia press [8] [8].
3. Enter the skillset mailbox number and password, and then press [#].
4. Follow the voice prompts.

Skillset mailbox password

To decrease the chances of unauthorized access to a skillset mailbox, change its password every 30 days.

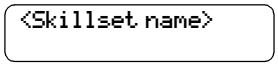
Keep a written copy of the skillset mailbox passwords in "Skillset mailboxes" on page 258. Give the skillset mailbox passwords only to the agents who retrieve messages at your call center. For security reasons, choose an uncommon password, not a predictable password like 1234 or 1111. If someone knows a skillset mailbox password, they can access the skillset mailbox and play or delete messages. They can also access CallPilot and use it fraudulently or disrupt service.

Changing a skillset mailbox password

You can change a skillset mailbox password at any time. A password must be from four to eight digits long and cannot start with zero.

To change a skillset mailbox password

1 Press [ ] 9 8 1.
Follow the voice prompts or the display buttons to open the skillset mailbox.



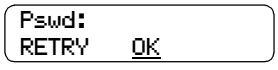
2 The skillset mailbox name appears briefly and the recorded name plays.

3 If you use the CallPilot interface:

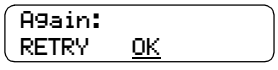
- Press 8 4 to open the Mailbox Password menu
- Go to step 4

If you use the Norstar Voice Mail interface:

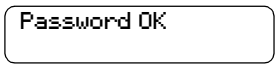
- Press ADMIN or 8
- Press PSWD or 4
- Go to step 4



4 Enter your new mailbox password and press OK or #.



5 Re-enter your new mailbox password and press OK or #.



6 This display appears briefly.

7 Press [ ] to end the session.

Resetting a skillset mailbox password

Note: Reset a password only if the agent who accesses the skillset mailbox forgets the password or is “locked-out”. The password for the reset mailbox is 0000. The agent who accesses the skillset mailbox cannot retrieve skillset mailbox messages until they create a new password. Tell the agent to change the default password as soon as possible. While the skillset mailbox has the default password, the mailbox is vulnerable to unauthorized access.

To reset a skillset mailbox password

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
   The Mailbox List page appears.
3. Click the **Reset Password** link for the skillset mailbox you want to reset the password for.
   A message appears that asks you to confirm your request to change the password.
4. Click the **OK** button.
   The password is reset to 0000, the default password.

Recording skillset mailbox greetings

After you initialize a skillset mailbox, record the greetings for it.

You can record Primary, Alternate and Personalized greetings for each skillset mailbox. You record a Primary skillset mailbox greeting for everyday use. The Alternate skillset mailbox greeting is an optional greeting you can record for special circumstances. If your call center subscribes to Caller ID, you can record Personalized skillset mailbox greetings.

If you record Primary and Alternate skillset mailbox greetings, you must choose which greeting plays to callers who reach the skillset mailbox.

You can also record greetings in an Alternate Language. Callers can press 9 while the greeting is playing to listen to the voice prompts in the Alternate Language. Remember to inform callers in the Primary skillset mailbox greeting that they can press 9 to hear the Alternate Language.

The skillset mailbox must use the Norstar Voicemail interface for callers to be able to press 9 to hear the Alternate language. Callers cannot select an alternate language if the skillset mailbox uses the CallPilot interface.

If the Operator Status is set to Yes, and a caller presses 0 during the skillset mailbox greeting, the caller transfers to the receptionist or Operator. For information about Operator Status, refer to the *CallPilot Manager Set Up and Operation Guide*. Inform callers in the skillset mailbox greetings that they can press 0 to speak to the receptionist or Operator.

If the Operator Status is set to No, a caller who presses 0 during the skillset mailbox greeting is informed the Operator is not available, and is transferred to the skillset mailbox.

Examples of Primary and Alternate greetings

You must record a Primary greeting for each skillset mailbox. In the Primary greeting include the skillset mailbox name that is listed in the Company Directory. For example:

"*Hello. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, phone number and a brief message. One of our agents will return your call as soon as possible. Thank you.*"

You can record an Alternate greeting for each skillset mailbox. Use an Alternate greeting for special circumstances. In the Alternate skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory.

For example:

"*Season's Greetings! You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, phone number and a brief message. One of our agents will return your call when we re-open on December 27. Thank you.*"

To record a Primary or Alternate skillset mailbox greeting

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

<Skillset name>

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press 8 2 to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press GREET or 2
- Go to step 4

Greeting options
REC CHOOSE CFWD

4 Press REC or 1.

Greeting:
PRIME ALT PERS

5 Press PRIME or 1 to record the Primary greeting
or
press ALT or 2 to record the Alternate greeting.
If you are changing a greeting, the current greeting starts to play.

Not recorded

6 If this is the first time you are recording a greeting, this display appears briefly.

Record now?
YES NO QUIT

7 Press YES or 1 and record your greeting at the tone.

Record greeting:
RETRY OK

8 Press OK or # to end the recording.

Accept greeting?
RETRY PLAY OK

9 Press OK or # to accept the recording
or
press PLAY or 1 to listen to the greeting
or
press RETRY or 2 to rerecord the greeting.

10 Press [ ] to end the session.

Choosing a Primary or Alternate skillset mailbox greeting

If you record a Primary and an Alternate skillset mailbox greeting, you must choose which greeting plays. You can change the selection at any time and as often as needed. If you do not choose a greeting, the Primary skillset mailbox greeting plays.

If you choose the Alternate mailbox greeting, you must set whether the mailbox accepts messages. If you choose Yes the skillset mailbox receives messages in the normal way.

If you choose No:

- messages cannot be left in the skillset mailbox
- the Alternate mailbox greeting takes precedence over all other greetings
- if a caller presses a button to fast forward the message, they hear a voice prompt that says this is a special greeting
- if a caller presses a button to send a fax, the fax goes to the General Delivery Mailbox, not the skillset mailbox.

If you choose the Alternate mailbox greeting, remember to change back to the Primary mailbox greeting at the appropriate time.

To choose a Primary or Alternate skillset mailbox greeting

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

<Skillset name>

2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

- Press 8 2 to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

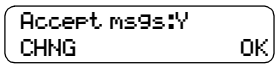
- Press ADMIN or 8
- Press GREET or 2
- Go to step 4

Greeting options
REC CHOOSE CFWD

4 Press CHOOSE or 2 to select a greeting.

Use greeting:
PRIME ALT QUIT

5 Press PRIME or 1 to select the Primary mailbox greeting and go to step 7
or
press ALT or 2 to select the Alternate mailbox greeting and go to step 6.



6 If you choose the Alternate mailbox greeting, you are asked whether the mailbox can accept messages.
Press CHNG or 1 to toggle from yes to no
or
press OK or # to accept.

7 Press ☎ to end the session.

Recording a Personalized skillset mailbox greeting

If your call center subscribes to Caller ID, you can record a maximum of three Personalized greetings for each skillset mailbox. For Personalized skillset mailbox greetings, you program Call Center to recognize a specific telephone number. The Personalized skillset mailbox greeting plays only for a call from the specific telephone number.

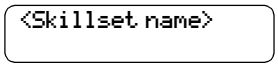
If you record a Personalized greeting, program the skillset mailbox to receive messages and choose an Alternate mailbox greeting, the Personalized greeting takes precedence over any other greetings. If you program the skillset mailbox not to receive messages and choose an Alternate mailbox greeting, the Alternate mailbox greeting takes precedence over any other greeting, including Personalized mailbox greetings.

In the Personalized skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory. For example:

"*Hi John. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your order. One of our agents will return your call if you need to speak to someone directly. Thank you.*"

To record a Personalized skillset mailbox greeting

1 Press [Transfer] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.



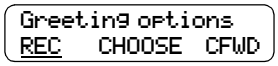
2 The skillset mailbox name appears briefly.

3 If you use the CallPilot interface:

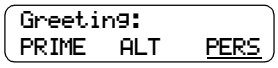
- Press [8] [2] to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

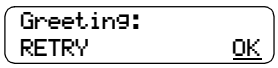
- Press ADMIN or [8]
- Press GREET or [2]
- Go to step 4



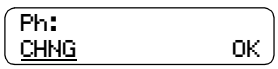
4 Press REC or [1].



5 Press PERS or [3] to record a Personalized greeting.

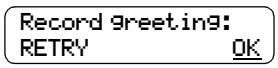


6 Enter a Personalized greeting number of 1, 2 or 3.



7 Press CHNG or [1].

8 Enter the phone number (maximum 10 digits) that you are assigning the Personalized mailbox greeting to.
Press OK or # to accept the phone number.



9 Lift your handset.
At the tone, record your greeting.
Press OK or # to end the recording.

10 Press OK or # to accept the greeting,
or
press PLAY or 1 to listen to the greeting
or
press RETRY or 2 to re-record the greeting.

11 Press ☎ to end the session.

Deleting a Personalized skillset mailbox greeting

If you no longer need a Personalized mailbox greeting, you can delete it.

To delete a Personalized mailbox greeting

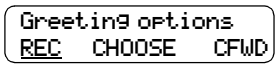
1 Press ✆ 9 8 1.
Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.

2 If you use the CallPilot interface:

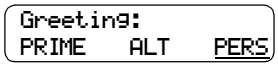
- Press 8 2 to open the Greetings Options menu
- Go to step 3

If you use the Norstar Voice Mail interface:

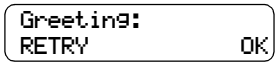
- Press ADMIN or 8
- Press GREET or 2
- Go to step 3



3 Press REC or 1.



4 Press PERS or 3 to choose a Personalized mailbox greeting.



5 Enter the Personalized greeting number (1, 2, or 3) that you want to delete.

6 Press DEL or 2 to delete the greeting.

7 Press ☎ to end the session.

Checking skillset mailboxes for messages

Frequently check the skillset mailboxes for messages. Only one agent can retrieve messages from each skillset mailbox at a time.

If different agents access the messages in the skillset mailbox throughout the day, each agent should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or pass the message on to another agent.

If the agent who listens to the message erases the message after writing down what it says:

- the next agent does not waste time listening to the same message
- the next agent knows if the callback was successful or not
- only one agent contacts the caller

If only one agent is responsible for retrieving messages at your call center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing skillset mailbox messages

Use the procedure for playing messages that corresponds to the interface you use:

- "To play skillset mailbox messages - Norstar Voice Mail" on page 75
- "To play skillset mailbox messages - CallPilot" on page 77

To play skillset mailbox messages - Norstar Voice Mail

Use this procedure if you use the Norstar Voice Mail interface.

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 Press PLAY or 2 to listen to your messages.
For other options, refer to the table "Playing skillset mailbox messages - Norstar Voice Mail" on page 75.

3 Press [ ] to end the session.

The table "Playing skillset mailbox messages - Norstar Voice Mail" shows the message options available to you during and after playing messages.

Playing skillset mailbox messages - Norstar Voice Mail

Option	Button	Available while playing	Available after playing	Description
Back up	1 or <<	✓		Rewinds the message nine seconds and resumes playing it.
Copy	5 or COPY	✓	✓	Sends a copy of the message to one or more mailboxes. If you record an introduction, it must be longer than three seconds.
End of Message	3 3 or >>> >>>	✓		Goes to the end of the message.
Envelope	7	✓	✓	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Erase	8 or ERASE	✓	✓	Deletes the message currently playing. If no messages are playing, deletes the last message played. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 77.)

Playing skillset mailbox messages - Norstar Voice Mail				
Option	**Button**	**Available while playing**	**Available after playing**	**Description**
Forward	3 or > >>	✓		Advances the message nine seconds and continues playing from that point. A message can be forwarded as many times as required.
Next	6 or # #	✓	✓	Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Pause/ Continue	2 or STOP/ PLAY	✓		Temporarily stops a message. When you stop the message, you can play the previous message, continue playing the current message, or skip to the next message.
Previous	4	✓	✓	Stops playing the current message and plays the previous message.
Quit	*		✓	Stops playing the message and plays the Mailbox main menu options.
Replay	1 1 or << <<	✓		Replays the message from the beginning.
Replay	1		✓	Replays the last message.
Reply	9 or REPLY	✓	✓	Replies to a message. (Refer to Note 3 on page 77) The reply can be either: - a message to an internal sender's mailbox - a telephone call to an internal or external party (Refer to Note 4 on page 77.)
Save Message	7 7 or SAVE	✓		Saves the message being played. (If you do not delete a message, it is automatically saved). This option is not shown on the display unless you erase a message. If you erase a message and play the message again, you can press SAVE on a two line display telephone. (Refer to Note 2 on page 77.)
Volume Control	*	✓		Adjusts the volume of the message that is playing. The volume increases each time you press *. After four presses, the volume returns to the lowest level.

Notes:

1 Because the skillset mailbox has limited message storage space, delete any messages you no longer need. After a certain time period, your saved messages are erased automatically. Ask your System Administrator about this.

2 You can retrieve a deleted message only if you have not quit the session in which you deleted it. For information about retrieving deleted messages refer to "Retrieving erased messages" on page 78".

3 Applies only if the Reply feature is enabled.

4 You can reply to an outside caller by dialing them back if your company subscribes to Caller ID (CLID) service. For further information about replying to an outside caller refer to "Replying to an external caller" on page 81.

To play skillset mailbox messages - CallPilot

Use this procedure if you use the CallPilot interface.

1 Press [ ] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

A voice prompt announces the number of new and saved messages that you have.

2 You can play any message that you want to listen to.
Press 2 to play the current message.
For other message commands, refer to the table "Playing skillset mailbox messages - CallPilot".

3 Press [ ] to end the session.

The table "Playing skillset mailbox messages - CallPilot" shows the message options that are available to you during and after playing messages.

Playing skillset mailbox messages - CallPilot

Option	Button	Available during and after playing	Description
Skip Back	1		Rewinds the message five seconds and resumes playing it at that point.
Skip Forward	3		Advances the message five seconds and continues playing from that point.
Previous Message	4		Stops playing the current message and plays the previous message.
Next Message	6		Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Call Sender	9		Places a call to the sender of a message.

Playing skillset mailbox messages - CallPilot			
Option	**Button**	**Available during and after playing**	**Description**
Help	*	✓	Offers a Help menu.
Reply	7 1	✓	Replies to a message.
Envelope	7 2	✓	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Forward Message	7 3	✓	Forwards the message to one or more mailboxes. You can record an introduction to the forwarded message.
Reply All	7 4	✓	Replies to a message and all recipients of the message. (Refer to Note 3 on page 77.)
Delete	7 6	✓	Deletes the current message. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes1 and 2 on page 76.)

Retrieving erased messages

After you play your messages and end your skillset mailbox session, any messages that you do not erase are saved. Since message storage space is limited, we recommend that you erase messages that are no longer needed.

You can retrieve an erased message if you are still in the skillset mailbox session. An erased message remains in the skillset mailbox until you end the current session.

To retrieve an erased message - Norstar Voice Mail

After you erase a new or saved message, the number of new or saved messages shown on the display is decreased by one. Even though the display shows 0 new 0 saved, you can still play and retrieve any erased skillset mailbox messages. Press PLAY or 2 to listen to the erased message.

To retrieve an erased message - CallPilot

You can retrieve a deleted message. A deleted message remains in the skillset mailbox until you end the current session. Locate the deleted message. Then press 7 6 to restore the message.

After you play the erased message, you can restore it. If you end the current session without restoring the erased message, it is permanently erased from the skillset mailbox.

Replying to messages

You can reply to internal and external callers. You can reply to an external caller if your company subscribes to CLID.

The messages you record must be longer than three seconds. The system times out after five seconds of silence.

Use the procedure for replying to messages that applies to the interface you use:

- "To reply to an internal caller - Norstar Voice Mail" on page 79
- "To reply to an internal caller - CallPilot" on page 80

Replying to an internal caller

If you use	and you want to	use
Norstar Voice Mail	reply to the caller's extension	CALL to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	MSG to record and send a reply to the internal caller's mailbox.
CallPilot	reply to the caller's extension	Call Sender 9 to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	Reply 7 1 to record and send a reply to the internal caller's mailbox.

To reply to an internal caller - Norstar Voice Mail

1 Press [Transfer] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new  0 saved
PLAY    REC    ADMIN
```

2 Press PLAY or 2.

```
End of message
REPLY   ERASE  NEXT
```

3 After you listen to the message, press REPLY or 9.

```
Reply to msg
MSG     CALL     QUIT
```

4 Press CALL or 2 to call the caller
or
press MSG or 1 to record and send a reply.

To reply to an internal caller - CallPilot

1 Press [✆] [9] [8] [1]
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 A mailbox summary is announced.
While you are in your message list, you can play any message.

3 Press [2] to play the current message.

4 Press [9] to call the caller
or
press [7] [1] to record and send a reply.

Replying to an external caller

You can reply to an external caller if your company subscribes to a Caller ID service and the skillset mailbox has an outdial method assigned to it. For information about outdial method refer to "Assigning an outdial method to a skillset mailbox" on page 84. Before you use the Reply option you must play the message.

Use the procedure that applies to the interface you use.

To reply to an external caller - Norstar Voice Mail

1 Press [Conf] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 Press PLAY or 2.

3 After you listen to the message, press REPLY or 9.
CallPilot dials the external number directly.

To reply to an external caller - CallPilot

1 Press [Conf] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

2 A mailbox summary is announced.
While you are in the message list you can play any message.

3 Press 2 to play the current message.

4 Press 9 to call the caller.
CallPilot dials the external number directly.

Chapter 7
Off-premise Message Notification

About Off-premise Message Notification

Off-premise Message Notification notifies you or a designated agent when there are new or urgent messages in the skillset mailbox. You can receive Off-premise Message Notification at any tone dial telephone number, pager or extension.

Note: Set up Off-premise Message Notification for non-business hours. Then Off-Premise Message Notification does not consume a Reserved or voice channel during busy periods.

You can receive notification of a message at a maximum of five different destination numbers. When the number of retry attempts is reached for each destination number, the next number in the series is called. For example, Call Center can call your car phone first when there is a message in the skillset mailbox. If there is no answer, Call Center waits five minutes and calls your car phone again. If there is still no answer, Call Center calls your car phone a third time. If there is no answer after three calls, Call Center calls the your home phone. Call Center continues to call at five minute intervals until the call is answered or all of the destinations are called three times.

Off-premise Message Notification, the Retry Intervals and Maximum Number of Attempts for skillset mailboxes are assigned through the Class of Service settings in CallPilot Manager. Skillset mailboxes have a default Class of Service of 1.

Class of Service 1 has these default settings for Off-premise Message Notification:

- Off-premise Message Notification enabled
- a Retry Interval of five minutes
- a Maximum Number of Attempts of 3

For information about changing Class of Service settings, refer to the *CallPilot Manager Set Up and Operation Guide*.

You must assign start and stop times for phone and destinations. Off-premise Message Notification begins when the start time is reached. Set the start time for a time when you are at the destination number so that you are there to receive calls.

A person who receives a Off-premise Message Notification call can cancel Off-premise Message Notification to their destination number. This is useful if a destination is incorrectly programmed and a wrong party receives the calls.

The recipient of an Off-premise Message Notification call hears the following voice prompt: "*Message for (name of mailbox owner). To log on press* 1. *If you have received this call by mistake, please press* 2.

After you set the Off-premise Message Notification parameters, Off-premise Message Notification is enabled automatically.

Assigning an outdial method to a skillset mailbox

The outdial method determines which line, line pool or route code the system uses for Off-premise Message Notification.

The default for outdial method is None. You must assign an outdial method before you can use an external telephone or a pager as an Off-premise Message Notification destination.

For more information on line pools and route codes, refer to your system documentation.

Warning: Do not change the extension number assigned to the skillset mailbox. If this extension number is changed, callers in the skillset cannot access the skillset mailbox and you cannot change the Skillset general parameters.
To correct a wrong extension number, change the extension number to the Control DN of the skillset.

To assign an outdial method to a skillset mailbox

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
   The Mailbox List page appears.
3. Click the **Change** link for the skillset mailbox you want to set up an outdial route for.
   The Mailbox page for the mailbox appears.
4. From the **Outdial Type** list box select the type of outdial method you want to use.
5. If you use a line or a line pool, in the **Line/Pool#** type the number of the outgoing line or line pool number you want to assign to the skillset mailbox for outdialing.
6. Click the **Submit** button.

Off-premise Message Notification parameters

You can set up the parameters for Off-premise Message Notification from any tone dial phone.

The parameters are:

- destination type (phone, extension or pager)
- destination number (phone, extension or pager)
- time range for receiving calls at phone numbers or extensions (Pagers are notified any time there is a qualifying message.)
- types of message you want to receive (all new messages or just urgent messages)

Note: The restrictions that apply to your phone line also apply to Off-premise Message Notification numbers. For example, if you cannot dial long distance phone numbers from your phone, you cannot have a long distance Off-premise Message Notification destination number.

Setting up Off-premise Message Notification

Follow these instructions if you have not set up Off-Premise Message Notification and are setting it up for the first time. If you have set up Off-Premise Message Notification, refer to the section on "Changing Off-premise Message Notification" on page 96.

To set up Off-premise Message Notification to	refer to
a phone number	page 86
an extension	page 89
a pager	page 91

To set up Off-premise Message Notification to a phone number

1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

3 Press ADMIN or [1] to set up Off-premise Message Notification.

```
Destination:
PHONE  EXT  PAGER
```

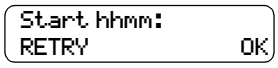
4 Press PHONE or [1] to choose a phone number destination.

```
Ph:
RETRY          OK
```

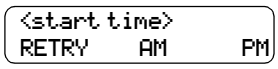
5 Enter the destination phone number and press OK or [#]. The destination phone number is a maximum of 30 digits.

6 Press OK or # to accept the destination phone number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

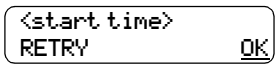
After you add special characters, press OK or # to accept the destination number.



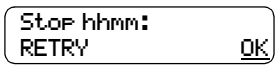
7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.



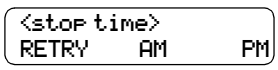
8 Press AM or 1
or
PM or 2.



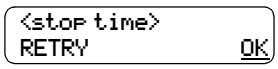
9 Press OK or # to accept the start time.



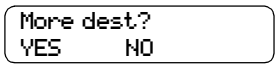
10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.



11 Press AM or 1
or
PM or 2.

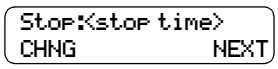


12 Press OK or # to accept the stop time.



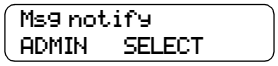
13 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

14 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.



15 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.

16 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.



17 Press ☎ to end the session.

To set up Off-premise Message Notification to an extension

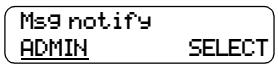
1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

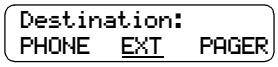
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3



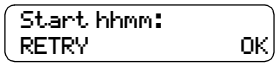
3 Press ADMIN or [1] to set up Off-premise Message Notification.



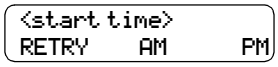
4 Press EXT or [2] to choose an extension as the destination.

5 Enter the destination number and press OK or [#].

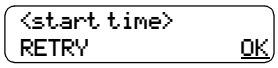
6 Press OK or [#] to accept the destination extension.
The <x> represents the extension.



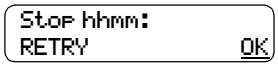
7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by zero.



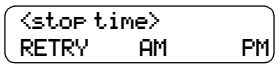
8 Press AM or [1]
or
PM or [2].



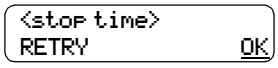
9 Press OK or [#] to accept the start time.



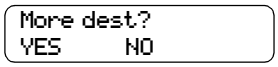
10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.



11 Press AM or 1
or
PM or 2.

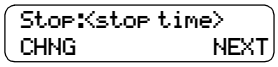


12 Press OK or # to accept the stop time.



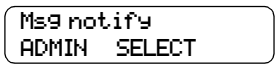
13 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

14 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.



15 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.

16 Press OK or # if you want to be notified when you the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.



17 Press ☎ to end the session.

About setting up Off-premise Message Notification to a pager number

Example of a destination pager number

If you are assigning a pager destination number from behind a PBX, remember to insert a 9 (depending on your system) before the # to access an outside line.

There is a combined limit of 30 characters for the pager phone number and the pager message.

For example, to reach your pager, enter:

4 2 5 5 5 1 2 3 4 # 3

where:

- # specifies the next digits are special characters
- 4 recognizes dial tone
- 2 specifies that the next digits are the numbers to be dialed
- 5 5 5 1 2 3 4 is the pager phone number dialed
- 3 inserts a timed pause

Depending on the company supplying your paging service, the programming sequence can vary. For more information about setting the destination phone number parameters for your pager, contact your pager company.

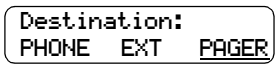
To set up Off-premise Message Notification to a pager

1. Press ✆ 9 8 1.
   Follow the voice prompts or the display button options to open the skillset mailbox.

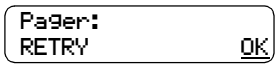
2. If you use the CallPilot interface:
   - Press 8 5 to open the Mailbox Tools
   - Press NOTIF or 2 to open the Off-premise Message Notification menu
   - Go to step 3

   If you use the Norstar Voice Mail interface:
   - Press ADMIN or 8
   - Press 6 to open the Off-premise Message Notification menu
   - Go to step 3

3 Press ADMIN or 1 to set up Off-premise Message Notification.



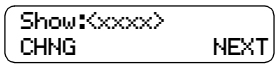
4 Press PAGER or 3 to select a pager number destination.



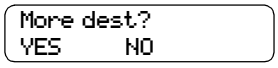
5 Enter the destination pager number and press OK or #.

6 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or #.



7 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.



8 Press YES or 1 if you want to set up another destination number
or
press NO or # if you do not want to set up another destination number.

9 Press OK or # to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 to change the message type to be notified only when the skillset mailbox receives an urgent message.

10 Press ☎ to end the session.

To set up Off-premise Message Notification to more than one destination

You can receive notification of a message at a maximum of five different destination numbers. The following steps show you how to enter a phone number destination and then add a pager destination for the first time.

1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

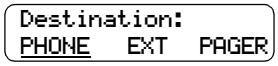
2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

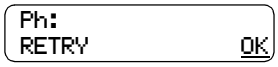
If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to set up Off-premise Message Notification.

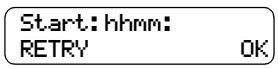


4 Press PHONE or [1] to choose a destination phone number.

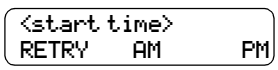


5 Enter the destination phone number and press OK or [#]. The destination phone number cannot be longer than 30 digits.

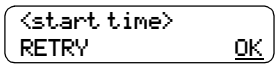
6 Press OK or [#] to accept the destination phone number, represented by <x>
or
press ADD or [2] to add special characters and use your dialpad or follow the voice prompts to add characters.



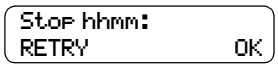
7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.



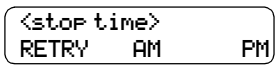
8 Press AM or [1]
or
PM or [2].



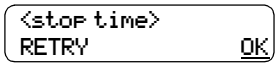
9 Press OK or # to accept the start time.



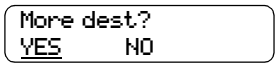
10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single digit hour and minute must be preceded by a zero.



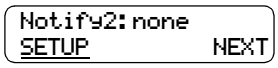
11 Press AM or 1
or
PM or 2.



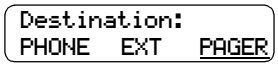
12 Press OK or # to accept the stop time.



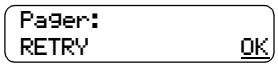
13 Press YES or 1 to set up another destination number.



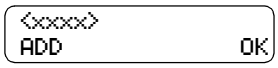
14 Press SETUP to set up another destination number.



15 Press PAGER or 3 to select a pager number destination.

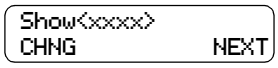


16 Enter the destination pager number and press OK or #.

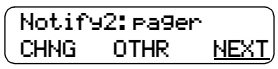


17 Press OK or # to accept the destination pager number represented by <x>
or
press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

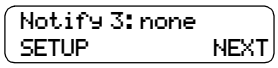
After you add special characters, press OK or #.



18 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.

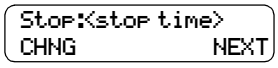


19 The display shows that the second destination is a pager. Press NEXT or # to continue.



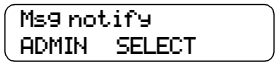
20 Press NEXT or # to continue
or
press SETUP to add another destination.

21 Press NEXT or # to accept the start time that you entered
or
press CHNG or 1 to change the start time.



22 Press NEXT or # to accept the stop time that you entered
or
press CHNG or 1 to change the stop time.

23 Press OK or # to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 to be notified only when the skillset mailbox receives an urgent message.



24 Press ☎ to end the session.

Changing Off-premise Message Notification

You can change the parameters and destinations for Off-Premise Message Notification. Refer to "Off-premise Message Notification parameters" on page 85 for more information about parameters.

If you want to change the time or message type parameters, use the procedure "To change the time range or type of message parameters" on page 96

If you want to change the destination type refer to the procedure for the destination type.

To change the destination type	refer to
from a phone to an extension, pager or another phone number	page 98
from a pager to an extension or phone	page 100
from a phone or extension to a pager	page 102

To change the time range or type of message parameters

1 Press [✆] [9] [8] [1].
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

2 If you use the CallPilot interface:

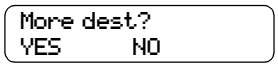
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

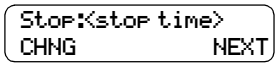
3 Press ADMIN or [1] to set up Off-premise Message Notification.

4 Press NEXT.
If you want to change the destination type refer to "To change the destination type" on page 96 for the appropriate procedure.



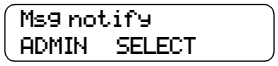
5 Press NO or [#] to continue.

6 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.



7 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

8 Press CHNG or 1 to change the message type to urgent.
Press OK or # to accept the new default message. You can choose to be notified of all new messages or urgent messages only. Change the message type to urgent to be notified only when the skillset mailbox receives an urgent message.



9 Press ☎ to end the session.

To change the destination from phone to another destination

1 Press [Feature] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

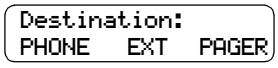
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

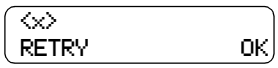
- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to set up Off-premise Message Notification.

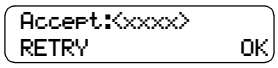
4 Press CHNG or [1] to change the destination.



5 Press PHONE or [1] to choose another phone number destination
or
press EXT or [2] to choose an extension destination
or
press PAGER or [3] to choose a pager number destination.

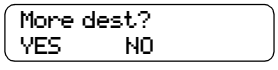


6 Enter the destination number and press OK or [#].
The destination phone number cannot be longer than 30 digits.



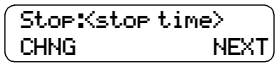
7 Press OK or [#] to accept the destination number
or
press RETRY or [*] to re-enter the destination number.

8 Press NEXT or [#] to continue
or
press CHNG or [1] to change the destination, and repeat steps 6 through 8.



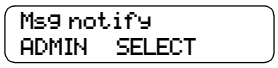
9 Press YES or [1] if you want to set up another destination number
or
press NO or [#] if you do not want to set up another destination number.

10 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.



11 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

12 If you want to change message notification,
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.
Press OK or #.



13 Press ☎ to end the session.

To change the destination from pager to phone or extension

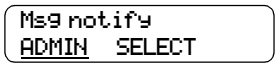
1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

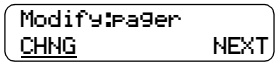
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

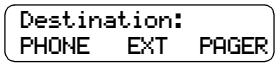
- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3



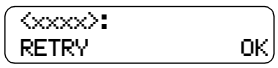
3 Press ADMIN or [1] to change Off-premise Message Notification. The displays a review of the first destination type and destination number.



4 Press CHNG or [1] to change the destination type and the destination number.

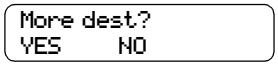


5 Choose the type of destination number:
press PHONE or [1] to choose a phone number destination
or
press EXT or [2] to choose an extension destination.



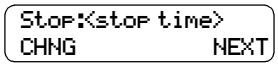
6 Enter the destination number you want to set up Off-Premise Message Notification for.
<x> represents the destination number.
Press OK or [#] to accept the destination number
or
press RETRY or [*] to re-enter the number.

7 Press NEXT or [#] to continue.



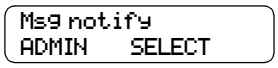
8 Press YES or [1] if you want to set up another destination, and repeat steps 6 through 8
or
press NO or [#] if you do not want to set up another destination.

9 Press CHNG or 1 to change the start time
or
press NEXT or # to accept the start time.



10 Press CHNG or 1 to change the stop time
or
press NEXT or # to accept the stop time.

11 If you want to change message notification,
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.
Press OK or #.



12 Press ☎ to end the session.

To change the destination from phone or extension to pager

1 Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

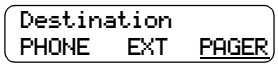
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to change Off-premise Message Notification. The displays show a review of the first destination type and destination number.

4 Press CHNG or [1] to change the destination type and the destination number.
<x> represents the type of destination (phone or extension).

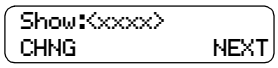


5 Press PAGER or [3] to choose a pager number destination.

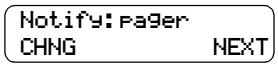
6 Enter the pager number and press OK or [#] to continue.

7 Press OK or [#] to accept the destination pager number represented by <x>
or
press ADD or [2] to add special characters and use your dialpad or follow the voice prompts to add characters.

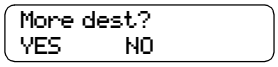
After you add special characters, press OK or [#].



8 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press CHNG or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.



9 The display shows notification is set up to a pager.
Press NEXT or # to continue.



10 Press YES if you want to set up another destination number
or
press NO if you do not want to set up another destination number.

11 Press OK or # if you want to be notified when the skillset mailbox receives a new message
or
press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

12 Press ☎ to end the session.

Deleting a destination number

If you have more than one destination number for Off-premise Message Notification, you can delete a destination.

To delete a destination number

1 Press [Feature] 9 8 1.
Follow the voice prompts or the display button options to open the skillset mailbox.

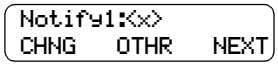
2 If you use the CallPilot interface:

- Press 8 5 to open the Mailbox Tools
- Press NOTIF or 2 to open the Off-premise Message Notification menu
- Go to step 3

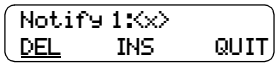
If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press 6 to open the Off-premise Message Notification menu
- Go to step 3

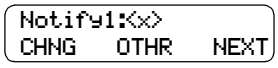
3 Press ADMIN or 1 to set up Off-premise Message Notification.



4 Press OTHR if you want to delete the first destination
or
press NEXT or # to view the other destinations until you find the destination that you want to delete. When you find the destination that you want to delete, press OTHR.



5 Press DEL to delete the first destination number.



6 The first destination number is deleted. The Notify 2 destination changes to become the Notify 1 destination number.
To delete more destination numbers, press OTHR and repeat steps 4 and 5.

7 Press [End] to end the session.

Adding a destination number

Use this procedure if you have set up Off-premise Message Notification and you want to add another destination number. You can have up to five destination numbers.

To add a destination number

1 Press [Transfer] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

2 If you use the CallPilot interface:

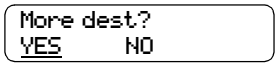
- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

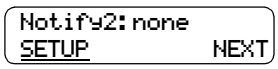
- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

3 Press ADMIN or [1] to set up Off-premise Message Notification.

4 Press NEXT or [#] to continue.



5 Press YES or [1] to set up another destination number.



6 Press SETUP or [1] to set up another destination number and follow the steps in "To set up Off-premise Message Notification to a phone number" on page 86
or
"To set up Off-premise Message Notification to an extension" on page 89
or
"To set up Off-premise Message Notification to a pager" on page 91.

Turning Off-premise Message Notification on or off

You can turn Off-premise Message Notification on or off at any time. If you turn Off-premise Message Notification off, you do not affect any of the assigned parameters.

To turn Off-premise Message Notification on or off

1 Press [Transfer] [9] [8] [1].
Follow the voice prompts or the display button options to open the skillset mailbox.

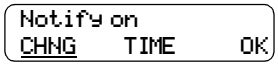
2 If you use the CallPilot interface:

- Press [8] [5] to open the Mailbox Tools
- Press NOTIF or [2] to open the Off-premise Message Notification menu
- Go to step 3

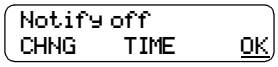
If you use the Norstar Voice Mail interface:

- Press ADMIN or [8]
- Press [6] to open the Off-premise Message Notification menu
- Go to step 3

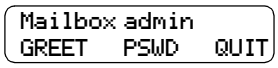
3 Press SELECT or [2] to set up Off-premise Message Notification.



4 Press CHNG or [1] to turn Off-premise Message Notification off if it is on (as shown).



5 Press OK or [*]
or
press TIME to review the start and stop time parameters.



6 Press [End] to end the session.

Chapter 8
Recording Call Center Greetings

About Call Center greetings

Call Center greetings encourage callers to stay on the line until an agent is available. You can record greetings in different languages and change them as often as you like.

You can include information in your greetings such as:

- your hours of service
- a request for callers to have their account number ready
- how to leave a message
- an announcement of a sale
- product lists
- upcoming special events

The table "A comparison of Basic and Professional Call Center" on page 15 shows how many greetings you can record, depending on which Call Center you use.

You can record greeting numbers and information in "Call Center Greetings" on page 254.

Examples of Call Center greetings

You can record different types of greetings for Call Center. Before you record your greeting, determine what information the greeting includes. When you prepare your greeting, include important times and dates. Keep greetings as short and concise as possible. Use the following examples of greetings as a reference.

General company greeting	The general company greeting informs callers that they have reached the correct company. It can also include the location and business hours of your company. *"Thank you for calling Bridgestone Computers. We are located at 52 Main Street. Our hours of service are Monday to Friday from 8:00 until 5:00. Please stay on the line and an agent will be with you as soon as possible. Or press 0 to leave a message and one of our agents will return your call."*
Please wait greeting	Please wait greetings encourage callers to stay on the line. *"All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us."*
Information greeting	An information greeting provides messages and announcements to callers. "*Thank you for calling Bridgestone Computers. This week we have extended our hours until we sell all spring merchandise. We will be open until 9:00 pm Monday through Thursday, and we will be open until midnight on Friday! Please come in and see us at 52 Main Street."*

Transfer greeting	A transfer greeting lets a caller transfer their call. *"Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices."*
Non-business hours greeting	Your non-business hours greeting will be played after your business is closed: "*You have reached Bridgestone Computers. Our hours of service are Monday to Friday from 8:00 until 12:00 and 1:00 until 5:00. To leave a message, please press zero. An agent will return your call when we re-open. Thank you for calling.*"
Expected Wait Time greeting	EWT greetings notify callers of their expected wait time in a skillset. *"Based on the current volume of calls, the next agent will be available in two minutes."*

Recording a Call Center greeting

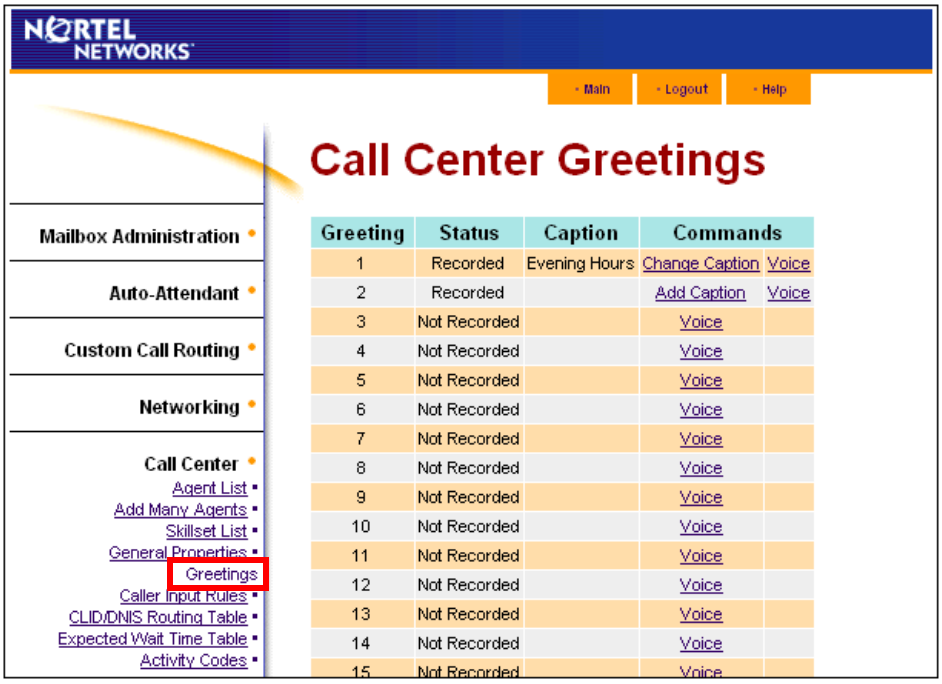
Before you record a greeting, write the greeting out so that you include everything that you want to say.

We recommend that you record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, callers must wait in a skillset a longer time before they hear another greeting.

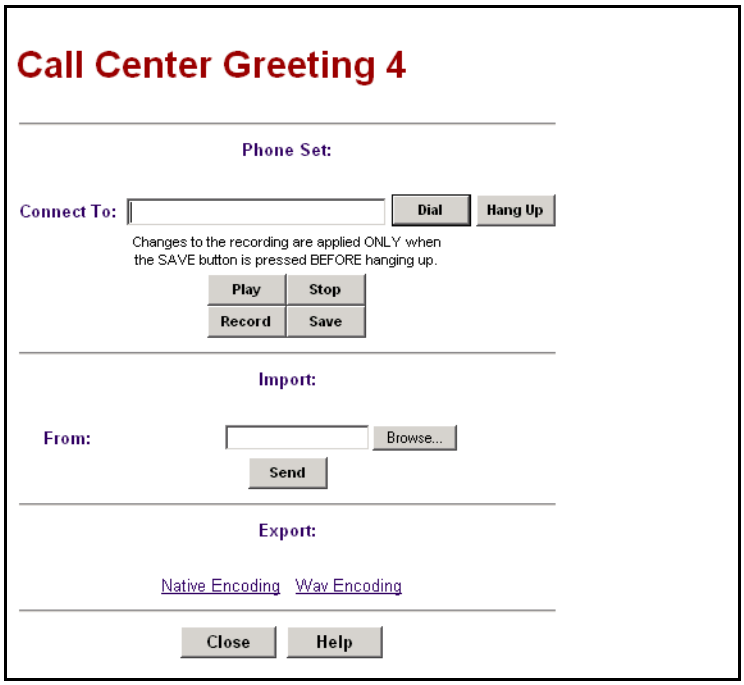
To record a Call Center greeting

1 Click the **Call Center** heading.

2 Click the **Greetings** link.
The Call Center Greetings page appears.



3 Click the **Voice** link for the number of the greeting you want to record.
The page you can record a greeting from appears. If you use CallPilot 100/150, the import and export options do not appear.



4 In the **Connect to** box, type the extension number or telephone number you are using to record the greeting.
For a local extension, type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voicemail system. For example, you might need to dial 9, the area code, and then the telephone number. For a telephone number that is not a local extension, the number you dial must use a destination code. For more information about destination codes, refer to your telephony System Administrator.

5 Click the **Dial** button.
The telephone rings.

6 Pick up the handset. Do not use Handsfree. Click the **Record** button. After the tone, record your greeting.

7 After you finish recording, click the **Stop** button.

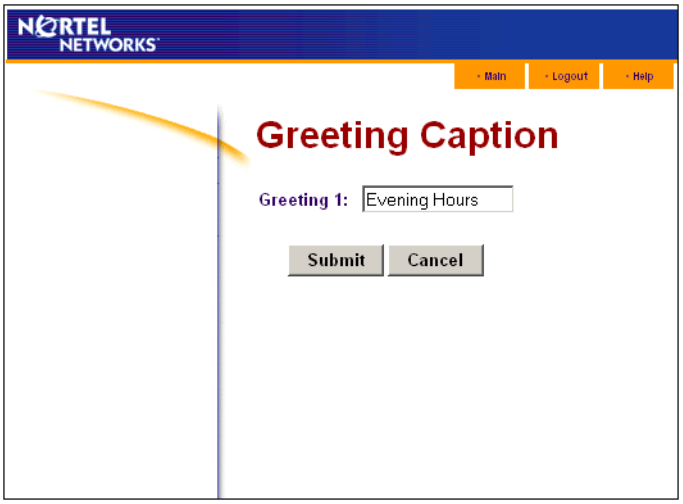
8 To listen to the recording, click the **Play** button
or
to save the recording, click the **Save** button.
The recording replaces a previously recorded greeting.

9 Click the **Close** button and replace the telephone handset.

Note: You can disconnect the telephone by clicking the Hang Up button or replacing the telephone handset. The next time you use Play or Record, the phone number shown in the Connect to box is dialed. You do not need to hang up each time. The connection remains for several minutes, even if you close the page. You can access another greeting without having to re-answer your telephone. The connection disconnects after several minutes of inactivity, or if you log off CallPilot Manager.

10 If you are recording a greeting, you use Business Communications Manager and you want to enter a caption for the greeting, click the **Refresh** button on your browser.

11 Click the **Add Caption** link for the greeting.
The Greeting Caption page appears.



12 In the **Greeting** box type a descriptive name for the greeting.
The greeting caption can be a maximum of 30 characters.

13 Click the **Submit** button.

Note: If you want to change the Greeting Caption, click the Change Caption link and make your changes.

Importing a Call Center greeting

If you use Professional Call Center on Business Communications Manager you can import a previously recorded greeting. You cannot import a previously recorded greeting if you use CallPilot 100/150.

The WAV file format must be:

- Bit Rate - 8 KHz
- Audio sample size - 16 bit
- Channels - 1 (mono)
- Audio format - PCM

To import a previously recorded greeting

1. Click the **Call Center** heading.
2. Click the **Greetings** link.
   The Call Center Greetings page appears.
3. Click the **Voice** link for the number of the greeting you want to record.
   The page you can record a greeting from appears.
4. If you know the location of the greeting, in the **Import** box type the location of the file and click the **Send** button
   or
   if you do not know the location of the greeting, at the **Import** option click the **Browse** button and follow steps 6 through 9.
   The Open dialog box appears.
5. From the **Look in** list, select the location of the file.
6. In the **File name** box, type the file name.
7. From the **Files of type** list, select the file type.
8. Click the **Open** button.
9. Click the **Send** button.
10. To play the greeting, in the **Connect to** box type an extension or telephone number and click the **Play** button.
    Your telephone rings.
11. Answer the telephone to listen to the greeting.
12. Click the **Save** button to save the greeting.
    The greeting you save replaces the previously recorded greeting.
13. Click the **Close** button and replace the telephone handset.
14. If you use Business Communications Manager, you can enter a caption for the greeting. Click the **Refresh** button on your browser.

15 Click the **Add Caption** link for the greeting.
The Greeting Caption page appears.

16 In the **Greeting** box type a descriptive name for the greeting.
The greeting caption can be a maximum of 30 characters.

17 Click the **Submit** button.

Note: If you want to change the Greeting Caption, click the Change Caption link and make your changes.

Exporting a Call Center greeting

If you use Professional Call Center on Business Communications Manager, you can export a previously recorded greeting to a computer file in WAV or in its native format. You cannot export a previously recorded greeting if you use CallPilot 100/150.

Export the greeting in its native format if you want to re-import the file later. You can re-import the file to your system or another Call Center or CallPilot system. Export the file in its native format if you want to use the same greetings at different company locations. If you keep the file in its native format, you avoid converting the file to another format, which can lessen its sound quality.

Export the greeting in WAV format if you want to edit the sound file on your computer.

To export a previously recorded greeting

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Greetings** link.
The Call Center Greetings page appears.

4 Click the **Voice** link for the number of the greeting you want to export.
The page you can export a greeting from appears.

5 At the **Export** option click either the **Native Encoding** or **WAV Encoding** link.
The File Download dialog box appears.

6 Click **Save this file to disk** and click the **OK** button.
The Save As dialog box appears.

7 From the **Save in** list box, navigate to where you want to save the file and click the **Save** button.

Chapter 9
Setting up Intelligent Routing

About Intelligent routing

Intelligent routing gives you tremendous flexibility in controlling how calls are routed. Intelligent routing includes these methods for moving a call, based on various conditions:

Intelligent CLID/DNIS Routing	• the ability to route calls according to Multimedia Call Center, CLID/ANI, DNIS, ISDN Calling Number • this routing is applied when the call first enters the Call Center • is available if you use Professional Call Center • for information on CLID/DNIS routing, refer to "Setting up CLID/DNIS Routing" on page 49.
Intelligent Caller Input Routing, Basic	• the ability to route calls to the Automated Attendant, a CCR Tree, an operator or a skillset mailbox • this routing is applied when callers press a key in response to instructions in a greeting
Intelligent Caller Input Routing, Advanced	• includes the Basic capabilities plus the ability to create rules that route calls to other skillsets and locations depending on the caller input • lets you change the priority of the call • is available if you use Professional Call Center
Intelligent Overflow Routing	• routes calls to extensions, mailboxes, external phone number, the Automated Attendant, the skillset mailbox or CCR Tree as a transfer target • lets you change the priority of the call

Intelligent Overflow Routing

Use Intelligent Overflow Routing to control how calls are handled that are waiting in a skillset for an agent. You can specify that a waiting call:

- overflows to one or more skillsets and keeps its conditions and original skillset greetings. Agents from the specified skillsets can answer the call.
- moves to another skillset where the call loses its conditions, and takes on the properties of the new skillset, including skillset greetings. The system tracks the total length of the call from the time the call enters the system until it is answered.
- transfers to the skillset mailbox
- transfers to an extension, mailbox, external telephone number, CCR Tree, Automated Attendant or operator
- changes in priority level

Intelligent Overflow Routing handles calls differently depending on the rules that you create. Each rule is based on a mode, one or more conditions, and one or more actions.

Mode

Intelligent Overflow Routing looks at the mode the skillset is in to determine how to handle a call. A skillset can be in Day mode, Night mode, or 24 Hour Service. Each mode can have its own rules for how to handle calls. The default mode is Day.

Condition

After Intelligent Overflow Routing determines what mode the skillset is in, Intelligent Overflow Routing determines what conditions apply to the call. The two possible conditions are:

- Whether the timer expires. You set the length of time a call waits for an agent before the call is sent to the destination that you specify. The maximum time a call can wait is 59:59. When a call enters a skillset, the timer starts at 00:00. Overflow rules are applied according to the time a call is in a skillset, not according to the total time a call is in the system. For example, if you set up skillset 1 to move a call to skillset 2 after five minutes, and you set up skillset 2 to move a call to skillset 1 after two minutes, a call in skillset 1 will be moved to skillset 2 after five minutes. The call will move back to skillset 1 after an additional two minutes, then back to skillset 2 after an additional five minutes.

- Whether there are agents logged on to the skillset. If there are no agents logged on to the skillset, the call is sent to the destination that you specify. If you select the Agents Not Logged In check box, the overflow rule applies if there are no agents logged on to the skillset. If you do not select the Agents Not Logged In check box, the overflow rule applies if there are agents logged on to the skillset.

Note: You can select both conditions within the same rule. The rule applies when both conditions are met.

Action

When Intelligent Overflow Routing determines that a condition is met for the call, the call goes to the destination you specify. Possible actions are:

- moving the call to a new skillset.
  The caller hears the greetings for the new skillset.
- overflowing the call to one or more skillsets.
  The caller continues to hear the greetings from the original skillset.
- sending the call to the skillset mailbox
- transferring the call to an extension, external number, mailbox, skillset mailbox, Automated Attendant, CCR Tree or operator
- changing the priority of the call

Note: Note: if an overflow step is configured for No Agents, the overflow rule executes right away, and even a forced greeting will not play. If you want to play the greeting, configure a timer with the No Agents rule.

Examples of Intelligent Overflow Routing rules

Intelligent Overflow Routing gives you flexibility in setting the rules for how calls are handled. The following tables show examples of different ways you can configure Intelligent Overflow Routing rules.

Example 1

In this example, calls to the call center go to skillset 1, which is the company's service department. If a call is not answered by an agent within two and a half minutes, the call overflows to skillsets 2 and 3, the sales department skillsets. An agent from any of the three skillsets can answer the call.

The Call Center Administrator:

- selects the Day service mode
- sets the timer for 2 minutes and 30 seconds
- selects Overflow to Skillset as the action
- selects skillsets 2 and 3

Mode	Conditions	Action	Explanation
Day	02:30	Overflow: 2,3	This Intelligent Overflow Routing rule applies only if there are one or more agents are logged on. If a call is not answered by an agent before 2 minutes and 30 seconds, the call overflows to skillsets 2 and 3. When a call overflows, it also remains queued at the original skillset destination.

Note: If you want calls to overflow to multiple skillsets, specify all the skillsets in the same rule. The call bypasses skillsets with busy agents and overflows to the next skillset with an available agent.

Example 2

In this example, calls to the call center go to skillset 1. The Administrator wants to ensure that lower priority calls do not wait in a skillset indefinitely. If a call waits for 2 minutes or more, a higher priority is assigned to the call.

The Call Center Administrator:

- selects the 24 Hour Service mode
- sets the timer for 2 minutes
- selects Change Call Priority only as the action and selects 1 as the new call priority

Mode	Conditions	Action	Explanation
24 Hour	02:00	Change call priority to 1	This Intelligent Overflow Routing rule applies to any call that has been waiting in skillset 1 for 2 minutes. If a call is not answered by an agent when the timer elapses, the call priority changes to the highest priority.

Example 3

In this example, calls to the call center go to skillset 1, which is the company help line. If there are no agents logged on to the help line, the call moves to skillset 2, which is the company's service department. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

The Call Center Administrator:

- selects the Day service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	No Agents	Move to Skillset 2	Intelligent Overflow Routing checks to see whether agents are logged on to skillset 1, but does not check the timer. If there are no agents logged on to skillset 1, the call moves to skillset 2 and gets the new greetings for skillset 2. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

Example 4

In this example, calls to the call center go to skillset 1, which is the company help line. If no agents are logged on to skillset 1, the call immediately moves to skillset 2. If agents are logged on to skillset 1 and the call is not answered within two and a half minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Call Center Administrator creates two rules. In the first rule the Call Center Administrator:

- selects the 24 Hour service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

In the second rule the Call Center Administrator:

- selects the 24 Hour service mode
- sets the timer to 2 minutes and 30 seconds
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
24 Hour	No Agents	Move to Skillset 2	The call moves to skillset 2 if no agents are logged on. If agents are logged on and the call is not answered within 2 minutes and 30 seconds, the call transfers to the skillset mailbox.
24 Hour	02:30	Skillset Mailbox	

Example 5

In this example, calls to the call center go to skillset 1, which is the company's help line. If the call is not answered by an agent within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1, the call overflows to skillset 2, which is the service department. If the call is not answered within an additional two minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Call Center Administrator creates two rules. In the first rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow to skillset as the action
- selects skillset 2

In the second rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 4 minutes and 30 seconds
- selects the Agents not logged in check box
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 after the call is in skillset 1 for 2 minutes and 30 seconds and if there are no agents logged on to skillset 1. If the call is not answered within an additional 2 minutes the call transfers to the skillset mailbox.
Day	04:30 and No Agents	Skillset Mailbox	

Example 6

In this example, calls to the call center go to skillset 1, which is the company's help line. The Night Service Mode is set to start at 6:00 pm. After 6:00 pm there are no other skillsets with agents logged on. If no agents are logged on to skillset 1 or if the call is not answered by an agent within two and a half minutes, the call transfers to the skillset mailbox.

In this example, the Call Center Administrator inserts two rules. The Call Center Administrator:

- selects the Night service mode for both rules
- sets the timer to 2 minutes and 30 seconds as the condition for the first rule
- selects the Agents not logged in check box as the condition for the second rule
- selects the skillset mailbox as the action for both rules

Mode	Conditions	Action	Explanation
Night	02:30	Skillset Mailbox	The call transfers to the skillset mailbox if the call is not answered within 2 minutes and 30 seconds.
Night	No Agents	Skillset Mailbox	The call transfers to the skillset mailbox if there are no agents logged on to skillset 1.

Example 7

In this example, calls to the call center go to skillset 1, which is the company's order desk. Skillset 1 agents are the company's experienced sales agents. If no agents are logged on to skillset 1 and if the call is not answered by an agent within two and a half minutes, the call overflows to skillset 2. Skillset 2 agents are the company's less experienced sales agents.

The Call Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 if the call is not answered within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1.

Example 8

In this example, calls to the call center are answered by skillset 1, the company's sales skillset. If a call is not answered within 10 seconds, it overflows to skillsets 2, 3 and 4. If the call is not answered within an additional 20 seconds, the call goes to the skillset 1 mailbox.

The Call Center Administrator creates two rules.

In the first rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 10 seconds
- sets Overflow as the action
- selects skillsets 2, 3 and 4

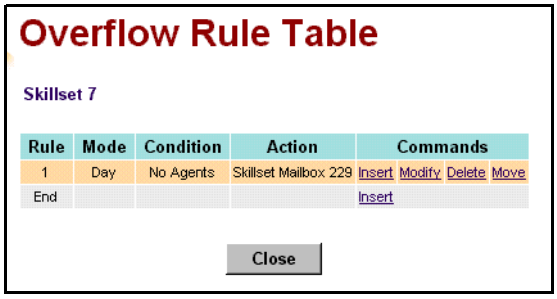
In the second rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 30 seconds
- selects the skillset mailbox as the action

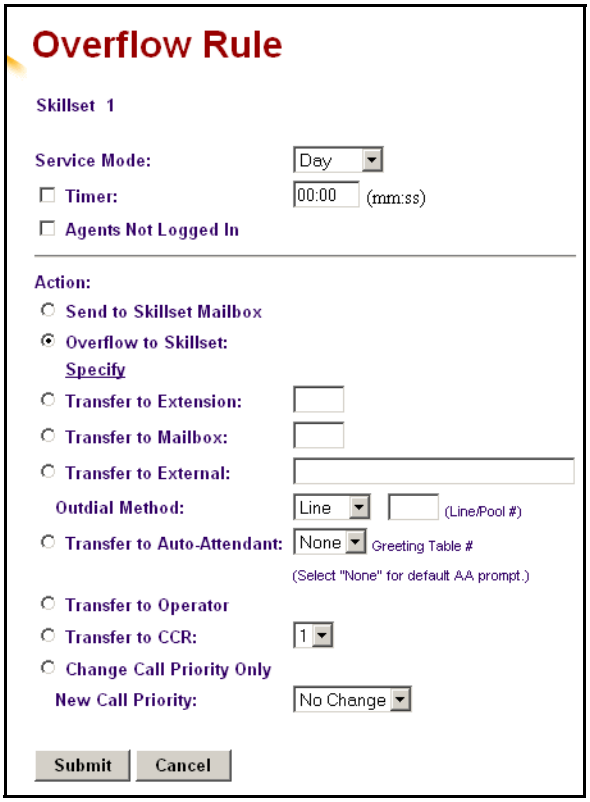
Mode	Conditions	Action	Explanation
Day	00:10	Overflow: 2, 3, 4	The call overflows to skillsets 2, 3 and 4 if the call is not answered within 10 seconds. The call goes to the skillset mailbox if it is not answered within an additional 20 seconds.
Day	00:30	Skillset Mailbox	

Assigning Intelligent Overflow Routing to a skillset

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Overflow** link for the skillset you want to add Intelligent Overflow Routing to.
   The Overflow Rule Table page appears.



5. Click the **Insert** link for Rule 1.
   The Overflow Rule page appears.



6. From the **Service Mode** list box select **Day**, **Night** or **24 Hour**.

7 Select the **Timer** check box if you want Intelligent Overflow Routing to time how long the call waits, and enter the time that a call waits in the skillset before it goes to the destination that you specify.

8 Select the **Agents Not Logged In** check box to if you want Intelligent Overflow Routing to check whether there are agents logged on to the skillset
or
do not select the **Agents Not Logged In** check box and Intelligent Overflow Routing does not check to see if agents are logged on to the skillset.

9 At the **Action** option, select the destination for calls:

- to send the call to another skillset, select **Move to Skillset**, and from the list box select the skillset you want to move to call to. If you also want to change the priority of the call, from the **New Call Priority** list box select a new priority for the call. The default is 10.
- to send the call to the skillset mailbox, select **Send to Skillset Mailbox**
- to overflow the call to another skillset:
  - Select **Overflow to Skillset** and click the **Specify** link.
    The Overflow to Skillset Configuration page appears.
  - Select the check box for the skillset you want to overflow to, and click the **Submit** button.
  - If you want to change the priority of the call, from the **New Call Priority** list box select a new priority for the call. The default is 10.
- to transfer the call to an extension, select **Transfer to Extension** and enter the extension number
- to transfer the call to a mailbox, select **Transfer to Mailbox** and enter the mailbox number
- to transfer the call to an external number:
  - Select **Transfer to External**
  - Enter the external number
  - From the **Outdial Method** list box select **Line**, **Pool** or **Route**
  - If you select Line or Pool, enter the line or line pool number
- to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant** and select a Greeting Table from the list box, or None if you want the to call transfer to the default Automated Attendant prompt.
- to transfer the call to an operator select **Transfer to Operator**
- to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to

Note: You or the System Administrator must set up a CCR Tree before you can select it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

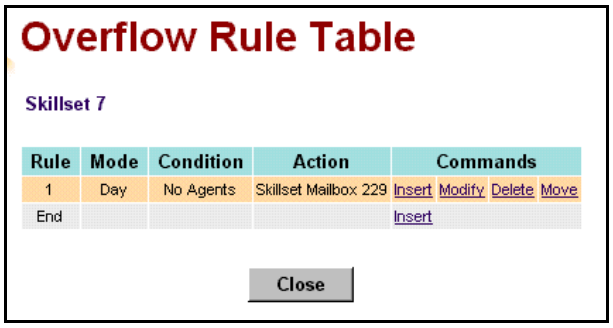
10 Click the **Submit** button.

Moving an Intelligent Overflow rule

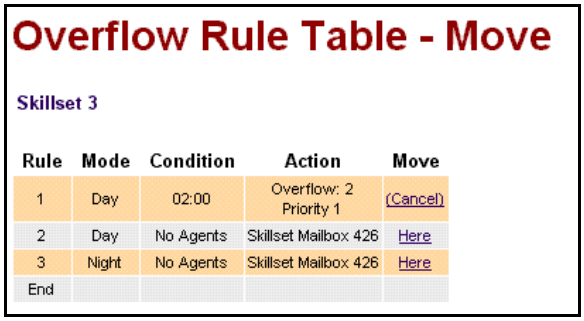
After you create an Intelligent Overflow rule, you can move it to another location in the Overflow Rule Table. Intelligent Overflow rules are applied to calls in the order that the rules appear in the Overflow Rule Table.

To move a rule

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Overflow** link for the skillset that has the rule you want to move.
   The Overflow Rule Table page appears.


Overflow Rule Table
Skillset 7
Rule Mode Condition Action Commands
1 Day No Agents Skillset Mailbox 229 Insert Modify Delete Move
End Insert
Close

5. Click the **Move** link for the rule you want to move.
   The Overflow Rule Table - Move page appears.


Overflow Rule Table - Move
Skillset 3
Rule Mode Condition Action Move
1 Day 02:00 Overflow: 2 Priority 1 (Cancel)
2 Day No Agents Skillset Mailbox 426 Here
3 Night No Agents Skillset Mailbox 426 Here
End

6. Click the **Here** link for the location you want to move the rule to.
   The Overflow Rule Table page shows the rule in its new location.
7. Click the **Close** button.

Modifying an Intelligent Overflow Rule

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Overflow** link for the skillset with the rule you want to modify.
   The Overflow Rule Table page appears.
5. Click the **Modify** link for the rule you want to modify.
   The Overflow Rule page appears.
6. Change the mode, conditions or actions for the rule.
7. Click the **Submit** button.
   The modified rule appears in the Overflow Rule Table page.
8. Click the **Close** button.

Deleting an Intelligent Overflow Rule

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Overflow** link for the skillset with the rule you want to delete.
   The Overflow Rule Table page appears.
5. Click the **Delete** link for the rule you want to delete.
   A message appears that asks you to confirm the deletion.
6. Click the **OK** button.
   The rule is deleted from the Overflow Rule Table page.
7. Click the **Close** button.

Chapter 10
Setting up Routing Tables

About Routing Tables

Routing tables determine how the system answers, holds and routes incoming calls to agents in your call center. You set up routing tables to handle incoming calls for each skillset. A call in a skillset receives the treatment specified by the routing table. The treatment can be a combination of greetings, transfers, distribution, and being on hold. If an agent becomes available, the call is sent to the available agent.

Each skillset has a Day and a Night Routing Table. Set up the Day Routing Table for your business hours. Set up the Night Routing Table for your non-business hours.

The maximum number of steps you can add to a routing table is 20.

You can record the routing table steps you create in "Routing Tables" on page 259.

Fax Detection

Call Center can detect fax calls and route them to a skillset mailbox. If you want Call Center to detect incoming faxes, you must make your first routing table step:

- a Greeting step
- with Forced Play
- without a transfer
- with a greeting that is a minimum of 11 seconds long

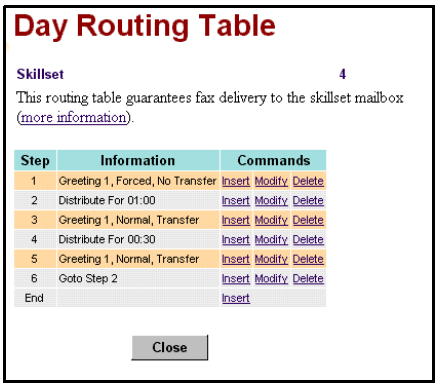
Fax Detection applies only if a fax machine is attempting to transmit a fax at the start of a greeting. If a fax transmission starts several seconds after the start of a greeting, it is possible for the fax tone not to be detected.

If you do not set up the routing table so it detects a fax call, some fax calls can be routed to agents, and some fax calls can be routed to the routing table's skillset mailbox.

To enable a routing table to detect fax calls, change the first step.

If you have a Business Communications Manager system and use Expected Wait Time, all greetings in the EWT table must be greater than 11 seconds to support fax detection.

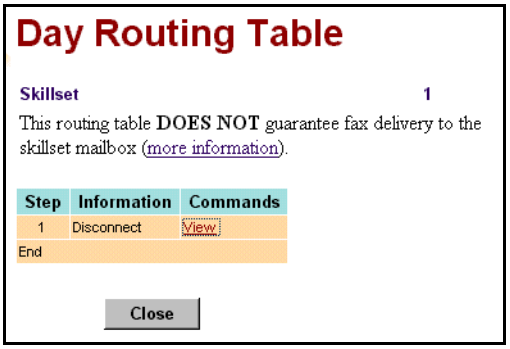
As you create routing tables, each table shows whether it detects faxes.


Day Routing Table
Skillset 4
This routing table guarantees fax delivery to the skillset mailbox (more information).
Step Information Commands
1 Greeting 1, Forced, No Transfer Insert Modify Delete
2 Distribute For 01:00 Insert Modify Delete
3 Greeting 1, Normal, Transfer Insert Modify Delete
4 Distribute For 00:30 Insert Modify Delete
5 Greeting 1, Normal, Transfer Insert Modify Delete
6 Goto Step 2 Insert Modify Delete
End Insert
Close

This routing table detects fax calls.

Its first step is a Greeting step:

- that is 11 seconds or longer
- that is Forced Play
- that does not have a transfer



This routing table does not guarantee fax detection.

Expected Wait Time

Expected Wait Time (EWT) is a greeting step that plays an expected wait time greeting to the caller. With EWT you can play a greeting based on the expected wait time of the call in a skillset. If you use Multimedia Call Center, the expected wait time is displayed in the caller's browser.

Each EWT greeting table can contain up to 11 greetings. Up to 10 of these are wait time intervals that you define with greetings for the expected wait time. The last greeting is a general greeting that can cover any wait time situation. This is the greeting that plays when there are no wait time intervals defined or if the EWT exceeds all the configured wait time intervals.

If you use Professional Call Center you can create a maximum of 20 EWT Tables. If you use Basic Call Center you can create a maximum of 5 EWT Tables.

Note: If you use a CallPilot system, Expected Wait Time is not available.

How EWT is computed is based on:

- Average call duration: the time when a caller is on the phone with an agent. This is an average for a predefined number of calls, based on the settings for the skillset.
- Number of higher priority calls ahead of the caller in all the skillsets that the same agents are assigned to.
- Number of agents in a skillset
- Availability of agents for a skillset's calls

How to set up EWT

To set up EWT you:

1. Record EWT Greetings.
   Refer to "Recording EWT greetings" on page 130.
2. Set up the EWT Table.
   Refer to "Setting up an EWT Table" on page 131.
3. Create a Greeting step that uses an EWT Table.
   Refer to "Adding a Greeting step" on page 138.
4. Set the EWT parameters.
   Refer to "Setting up or changing a skillset" on page 46.

Recording EWT greetings

The first step in setting up an EWT Table is recording EWT greetings. EWT greetings notify callers of their expected wait time in a skillset. Refer to "Recording a Call Center greeting" on page 109.

Examples of EWT greetings

Greeting 100	*Based on the current volume of calls, the next agent will be available in a minimum of two minutes.*
Greeting 101	*The expected wait time for your call is approximately three minutes.*
Greeting 102	*We're experiencing higher than normal call volumes. You will be waiting approximately five minutes.*
Greeting 103	*The expected wait time for your call is approximately ten minutes.*
Greeting 150	*Thank you for continuing to hold. We are experiencing high call volumes. Please stay on the line and your call will be answered by the next available agent.*

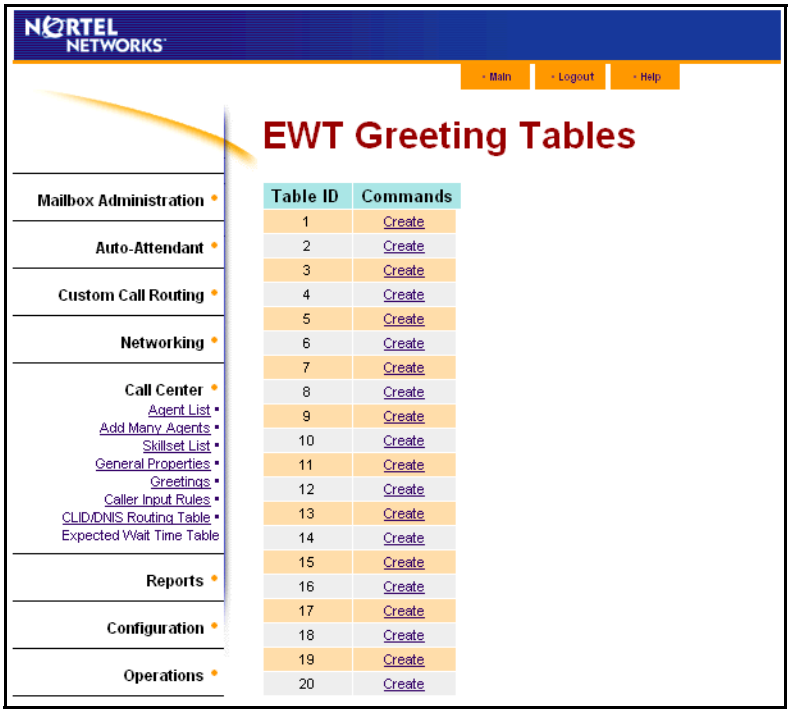
In this example, greetings 100 - 103 are wait time intervals.
Greeting 150 is the last greeting in the table that covers any wait time situation.

All of the options available for a normal Greeting Step are available for the EWT greeting, such as Forced Play and Basic and Advanced Intelligent Caller Input Routing. Callers can interrupt an EWT greeting the same way they interrupt a normal greeting.

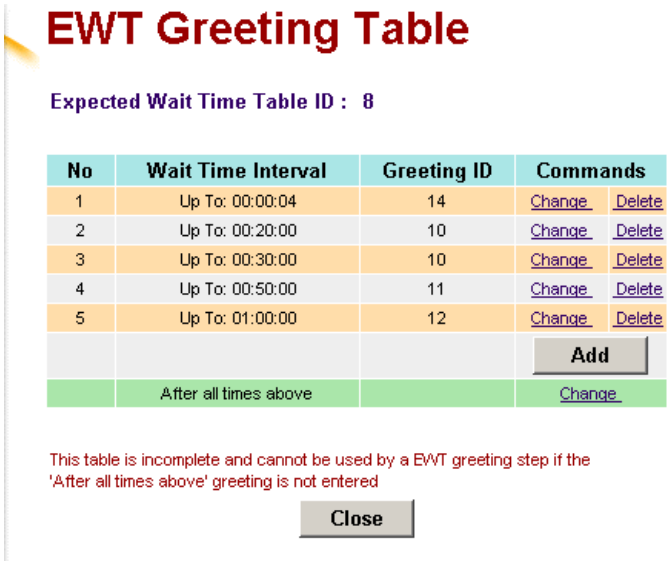
Setting up an EWT Table

1 Click the **Call Center** heading.

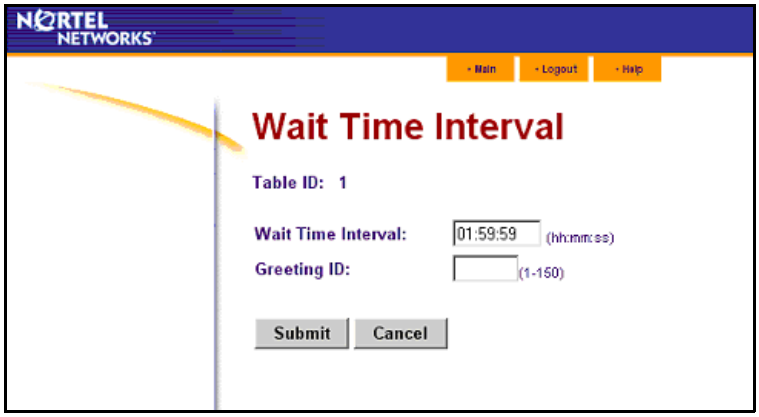
2 Click the **Expected Wait Time Tables** link.
The EWT Greeting Tables page appears. If you use Professional Call Center you have 20 EWT Greeting Tables. If you use Basic Call Center you have 5 EWT Greeting Tables.



3 Click the **Create** link.
The EWT Greeting Table page appears.


EWT Greeting Table
Expected Wait Time Table ID : 8
No
Wait Time Interval
Greeting ID
Commands
1 Up To: 00:00:04 14 Change Delete
2 Up To: 00:20:00 10 Change Delete
3 Up To: 00:30:00 10 Change Delete
4 Up To: 00:50:00 11 Change Delete
5 Up To: 01:00:00 12 Change Delete
Add
After all times above
Change
This table is incomplete and cannot be used by a EWT greeting step if the 'After all times above' greeting is not entered
Close

4 Click the **Add** button.
The Wait Time Interval page appears.



5 In the **Wait Time Interval** box enter the first EWT value in the format hh:mm:ss where:

- hh is number of hours from 0 – 24
- mm is number of minutes from 0 – 59
- ss is number of seconds from 0 – 59

  Each EWT table has a maximum of eleven entries: 10 wait time intervals and 11 greeting numbers. You enter a wait time and choose a greeting that plays during the wait time. Greetings must be recorded before you can select them for an EWT interval.

6 In the **Greeting ID** box enter the greeting number you want to use for this EWT.

7 Click the **Submit** button.
The EWT Greeting Table page appears.

8 At the bottom of the table, click the **Change** link for **After all times above**.
The After all times above page appears.

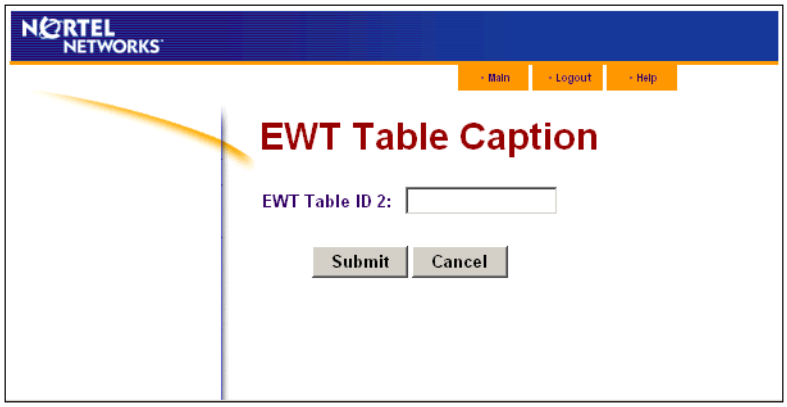
9 In the **Greeting ID** box enter the number of the greeting you want to use if the EWT exceeds the configured wait time intervals.

Note: The after all the times above value is mandatory. You must enter a value for the greeting that plays if the EWT exceeds the configured wait time intervals.

10 Click the **Submit** button.
The EWT Greeting Tables page appears.

11 Click the **Close** button.
The EWT Greeting Tables page appears.

12 If you use Business Communications Manager, you can enter a caption for the table.
Click the Add Caption link.
The EWT Table Caption page appears.



13 In the EWT Table box type a descriptive name for the table, for example *Peak Hours*.
The caption can be a maximum of 30 characters.

Note: If you want to change the Greeting Caption, click the Change Caption link and make your changes.

14 Click the **Submit** button.

You can now use this EWT Table in a Greeting step of a Day or Night routing table.
For how to do this refer to "Adding a Greeting step" on page 138.

Deleting an EWT Table

Before you can delete an EWT Table that is used by a routing table you must disable the skillset that uses the EWT Table. If you want to delete an EWT Table that is not referenced by a skillset, start at step 10.

1. Click the **Call Center** heading.
2. Click the **Skillset List** link.
   The Skillset List page appears.
3. Click the **Disable** link for the skillset you want to disable.
   A message appears that asks you to confirm the request to disable the skillset.
4. Click the **OK** button.
   On the Skillset List page in the Status column the skillset changes from Enabled to Disabled.
5. Click the **Day** or the **Night** link for the skillset with the EWT Table you want to delete.
   The Day or the Night Routing Table page appears for the skillset.
6. Click the **Modify** link for the Greeting step that contains the EWT Table.
   The Routing Step page appears.
7. Make the changes you want to the Greeting step so that it does not reference the EWT Table you want to delete.
8. Click the **Submit** button.
   The changed step appears in the Routing Table list.
9. Click the **Close** button to return to the Skillset List page.
10. Click the **Expected Wait Time Table** link.
    The EWT Greeting Tables page appears.
11. Click the **Delete** link for the EWT Table you want to delete.
    A message appears that asks you to confirm the deletion.
12. Click the **OK** button.

Note: When you delete an EWT Table, you delete its contents. The number of EWT Tables does not decrease. Your EWT greetings are not be deleted when you delete an EWT Table.

Changing an EWT Table

1. Click the **Expected Wait Time Table** link.
   The EWT Greeting Tables page appears.
2. Click the **Change** link for the table you want to change.
   The EWT Greeting Table page appears.
3. Click the **Change** link for the EWT rule you want to change.
   The Wait Time Interval page appears.
4. Modify the Wait Time Interval or greeting number.
5. Click the **Submit** button.
   The changed EWT rule appears in the EWT Table.

About types of Routing Table steps

You can add these types of steps to routing tables:

Greeting	A Greeting step plays a greeting to callers waiting in a skillset. You assign greeting parameters to each greeting. After the greeting plays, the call goes to the next routing step. If there is no next step, the call ends. An EWT Greeting step uses the EWT Table you select to play estimated wait time messages to callers. EWT greeting steps act the same as greeting steps.
Distribute for	During a Distribute for step, calls wait to be distributed to agents. If no agents are available before the distribution time expires, the call goes to the next step in the routing table. If there is no next step set up in the routing table, the call ends. The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds.
Goto	A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step. For example, if a Goto step points to step 1, the call goes back to step 1 and repeats the steps. The steps are repeated until an agent becomes available or the caller leaves a message in the skillset mailbox. The first step in a routing table cannot be a Goto step because there are no possible target steps yet. A Goto step cannot point to itself.
Transfer	A Transfer step can transfer calls to: • an extension • a mailbox • an external number • the Automated Attendant • an operator • a CCR Tree
Disconnect	A Disconnect step releases calls from the skillset. If the first step in a routing table is a Disconnect, Call Center does not answer the call.

Greeting step parameters

You can assign these parameters to greeting steps. If the first step in a routing table is a Greeting step, it can detect fax calls and route them to the skillset mailbox for the routing table. For more information refer to "Fax Detection" on page 127.

Forced Play	Enable Forced Play for a greeting that contains important information that you want callers to hear. If an agent becomes available while a caller is listening to a Forced greeting, the greeting is not interrupted. The caller must listen to the entire greeting. If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent. Limit the number of Forced Play greetings and keep Forced Play greetings as short as possible. Long Forced Play greetings increase the transfer time of calls to agents and cause unpredictable increases in distribution times. For more information, refer to "Routing Table administration" on page 212.
Intelligent Caller Input Routing, Basic	While the greeting plays callers can: • press 1 to transfer to the Automated Attendant • press 0 to transfer to the Operator • press 9 to leave a message in the skillset mailbox • press 2 to transfer to a CCR Tree These are the default keypad buttons. You can change the keypad buttons. Ensure that the Non-business hours greetings have Intelligent Call Input Routing, Basic enabled so that callers can direct how they transfer their calls.
Intelligent Caller Input Routing, Advanced	Advanced Intelligent Caller Input Routing is available if you use Professional Call Center. Intelligent Caller Input Routing, Advanced uses the Caller Input Rules you create to change the priority and route calls to other skillsets or locations based on caller multi-digit DTMF input. Callers enter a sequence of DTMF digits such as a charge card number or passcode. The caller input is used to determine call treatment. Based on the caller input, the call can change in priority and/or be routed to: • the Automated Attendant • the Operator • the skillset mailbox • a CCR Tree • a mailbox • an extension • an external number • another skillset Intelligent Caller Input Routing, Advanced parameters: • Retries is 0-5, default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error. • Number of Caller Input Rule tables is equal to the number of available skillsets.
No Intelligent Caller Input Routing	While the greeting plays callers cannot press a dialpad button to transfer their call. Call Center ignores buttons pressed on the dialpad. The greeting plays without interruption. This is the default setting. At the end of the greeting, the caller goes to the next routing step. If there is no next step, the call ends.

Adding a Greeting step

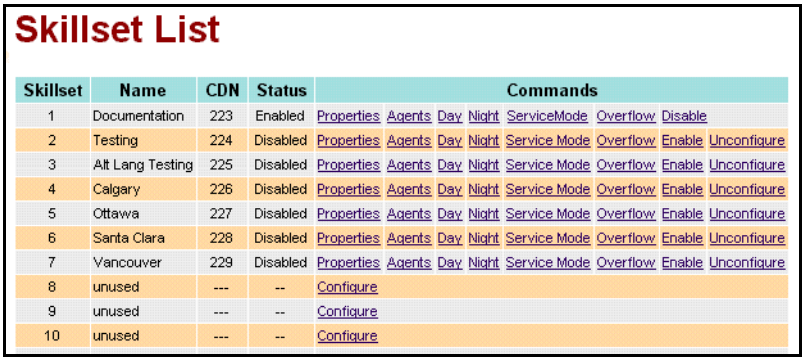
Greeting steps play a message to waiting callers.

To add a Greeting step

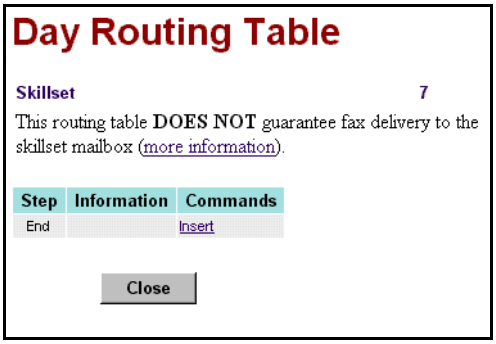
1 Start CallPilot Manager.

2 Click the **Call Center** heading.

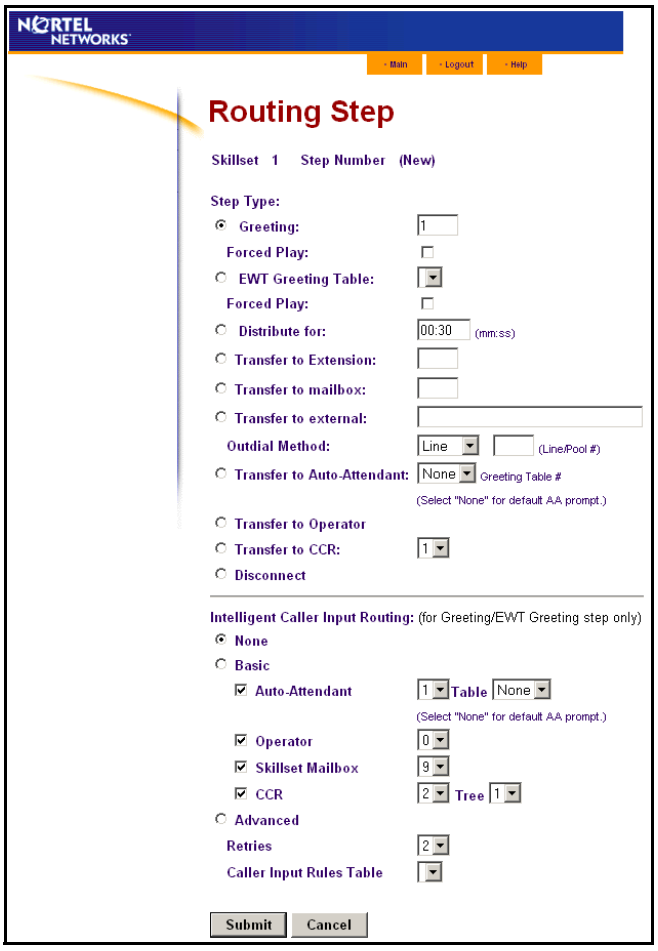
3 Click the **Skillset List** link.
The Skillsets List page appears.


Skillset List
Skillset Name CDN Status Commands
1 Documentation 223 Enabled Properties Agents Day Night ServiceMode Overflow Disable
2 Testing 224 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
3 Alt Lang Testing 225 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
4 Calgary 226 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
5 Ottawa 227 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
6 Santa Clara 228 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
7 Vancouver 229 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
8 unused --- -- Configure
9 unused --- -- Configure
10 unused --- -- Configure

4 Click the **Day** or the **Night** link for the skillset to which you want to add a greeting step.
The Day or the Night Routing Table page appears.


Day Routing Table
Skillset 7
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).
Step Information Commands
End Insert
Close

5 Click the **Insert** link.
The Routing Step page appears.



6 At the **Step Type** option, select **Greeting** and enter the greeting number you want to use
or
if you want to use Expected Wait Time greetings, select **EWT Greeting Table** and from the list select the EWT Table you want to use.
If you have entered a greeting caption for the greeting or the EWT Greeting Table, the caption name appears.

7 If you want the caller to listen to the entire message before they transfer to an agent, select the **Forced Play** check box.

8 At the **Intelligent Caller Input Routing** option, select how you want callers to be able to transfer their calls:

- Select **None** if you do not want callers to be able to transfer their calls.

- Select **Basic** if you want callers to be able to transfer to the Automated Attendant, operator, skillset mailbox or a CCR Tree. Select the transfers available to callers:
  - — Select the **Auto Attendant** check box if you want callers to be able to transfer to the Automated Attendant. By default callers press 1 to transfer to the Automated Attendant. and select a Greeting Table to transfer the call to, or select None to transfer the call to the default Auto Attendant prompt. You can assign a different dialpad button by selecting a number from the list box.
  - — Select the **Operator** check box if you want callers to be able to transfer to the Operator. By default callers press 0 to transfer to the Operator. You can assign a different dialpad button by selecting a number from the list box.
  - — Select the **Skillset Mailbox** check box if you want callers to be able to transfer to the skillset mailbox. By default callers press 9 to transfer to the skillset mailbox. You can assign a different dialpad button by selecting a number from the list box.
  - — Select the **CCR** check box if you want callers to be able to transfer to a CCR Tree. By default callers press 2 to transfer to a CCR Tree. You can assign a different dialpad button by selecting a number from the list box. From the **Tree** list box select the CCR Tree you want callers to transfer to.

Note: You or the System Administrator must set up a CCR Tree before you can select it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

- Select **Advanced** if you want callers to be able to enter multiple digits such as a passcode or a credit card number. Advanced is available only if you use Call Center Professional. Select the Advanced parameters:
  - — From the **Retries** list box select the a number between 0 and 5.
    The default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error.
  - — From the **Caller Input Rules Table** list box select a table. This is the rules table used for processing this route step.
    You must have created rules in the Caller Input Rules Table. For more information, refer to "Creating a Caller Input Rule" on page 155.

9 Click the **Submit** button.
The Greeting step appears in the Routing Table list.

10 Click the **Close** button to return to the Skillset list.

Adding a Distribute for step

Distribute for steps put callers on hold while they wait for an agent.

To add a Distribute for step

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Day** or the **Night** link for the skillset you want to add a distribution step to.
   The Day or Night Routing Table page appears for the skillset.
5. Click the **Insert** link for the step you want to add a Distribute for step to.
   The Routing Step page appears.
6. Click the **Distribute for** option.
7. In the **Distribute for** box enter the longest time in minutes and seconds that callers can wait on hold in this step.
8. Click the **Submit** button.
   The Distribute For step appears in the Routing Table list.
9. Click the **Close** button to return to the Skillset list.

Adding a Goto step

Goto steps send a caller to another step in the routing table. You can add a Goto step only to the end of a routing table.

To add a Goto step

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset** link.
   The Skillset List page appears.
4. Click the **Day** or the **Night** link for the skillset you want to add a Goto step to.
   The Day or the Night Routing Table page appears.
5. Click the **Insert** link for the step you want to add a Goto step to.
   The Routing Step page appears.
6. Click the **Goto Step** option.
7. From the **Goto Step** list box select the number of the Routing Table step you want to send callers to.
8. Click the **Submit** button.
   The Goto step appears in the Routing Table list.
9. Click the **Close** button to return to the Skillset List page.

Adding a Transfer step

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Day** or the **Night** link for the skillset you want to add a Transfer step to.
   The Day or the Night Routing Table page appears.
5. Click the **Insert** link for the step you want to add a Transfer step to.
   The Routing Step page appears.
6. Select where you want to transfer the call to:
   - if you want to transfer the call to an extension, select **Transfer to Extension** and enter the extension
   - if you want to transfer the call to a mailbox, select **Transfer to mailbox** and enter the mailbox number
   - if you want to transfer the call to an external number:
     — select **Transfer to external** and enter the external number
     — from the **Outdial Method** list box select **Line**, **Pool** or **Route**
     — if you select Line or Pool, in the **Line/Pool#** box enter the line or line pool number
   - if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant**. From the list box you can select the Greeting Table you want to transfer calls to, or None.
   - if you want to transfer the call to the operator, select **Transfer to Operator**
   - if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to.

   Note: You or the System Administrator must set up a CCR Tree before you can select it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

7. Click the **Submit** button.
   The Transfer step appears in the Routing Table list.
8. Click the **Close** button to return to the Skillset list.

Adding a Disconnect step

Disconnect steps release a call from the skillset it is in. If the first step in a routing table is a Disconnect step, Call Center does not answer the call.

To add a disconnect step

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillsets List page appears.
4. Click the **Day** or the **Night** link for the skillset you want to add a disconnect step to.
   The Day or the Night Routing Table page appears.
5. Click the **Insert** link for a step in the routing table.
   The disconnect step is added before this step. To add the disconnect step to the end of the routing table, click the **Insert** link for the End step. If the Routing Table is full the End step does not appear.
   The Routing Step page appears.
6. Click the **Disconnect** option.
7. Click the **Submit** button.
   The Disconnect step appears in the Routing Table list.
8. Click the **Close** button to return to the Skillset List page.

Assigning Routing Table hours of operation

To assign the routing table hours of operation for each day of the week, you set the start times for the Day and Night Routing Tables for each skillset. The start times determine which routing table is used for the skillset.

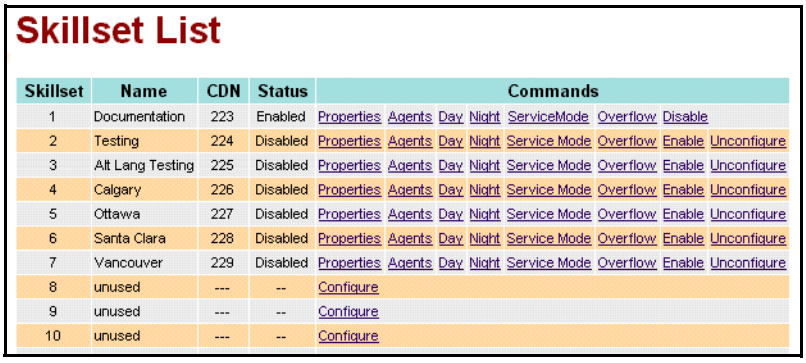
You can also leave the default as 24 hour operation. If you select 24 hour operation, the skillset uses the Day Routing Table only for that day.

To assigning hours of operation to a skillset

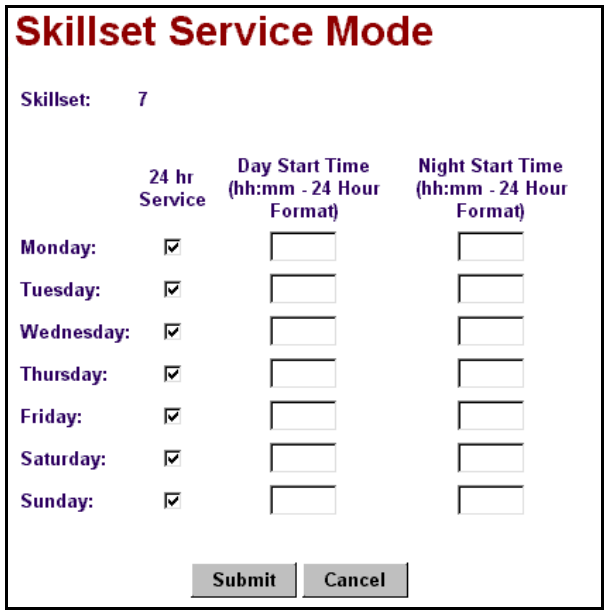
1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.


Skillset List
Skillset
Name
CDN
Status
Commands
1 Documentation 223 Enabled Properties Agents Day Night ServiceMode Overflow Disable
2 Testing 224 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
3 Alt Lang Testing 225 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
4 Calgary 226 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
5 Ottawa 227 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
6 Santa Clara 228 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
7 Vancouver 229 Disabled Properties Agents Day Night Service Mode Overflow Enable Unconfigure
8 unused --- -- Configure
9 unused --- -- Configure
10 unused --- -- Configure

4 Click the **Service Mode** link for the skillset you want to set up.
The Skillset Service Mode page appears.



5 For each day of the week set the hours of operation for the skillset:

- to have the skillset operate in 24 hour mode, leave the **24 hr Service** check box selected for that day
- to set the start time for the Day Routing Table, in the **Day Start Time** box enter the start time in 24 hour format
- to set the start time for the Night Routing Table, in the **Night Start Time** box enter the start time in 24 hour format

6 Click the **Submit** button.

Setting the Service Mode for skillsets

You must set the Service Mode the skillset uses so that calls are answered correctly.

Before you set the Service Mode you must:

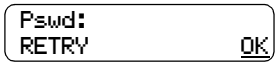
- configure a skillset
- set up at least a Day Routing Table for the skillset

The default Call Center Service Mode is 24 hour operation. You can change the hours of operation using the Operator Feature Code (9 8 2). There are six possible Service Modes:

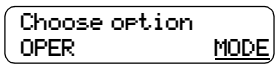
Auto	The skillset uses the Automatic Service Mode. You must configure both the Day and Night Routing Tables before you can assign the Auto Service Mode to the skillset.
Day	The skillset uses the Auto Service mode and the Day Routing Table. You must configure the Day Routing Table before you can assign the Auto Service Mode and the Day Routing Table.
Night	The skillset uses the Manual Service mode and the Night Routing Table. You must configure the Night Routing Table before you can assign the Auto Service Mode and the Night Routing Table.
24 Hour	The skillset uses the Day Routing Table only. You must configure the Day Routing Table for 24 hour operation to use this Service Mode.
Uninit	The skillset is not configured. You must configure the skillset before you can assign a Service Mode.
Invalid	You have only partially configured the skillset. You cannot enable this skillset.

Note: If you originally configure the skillset with a Day Routing Table only and enable the skillset, Call Center will recognize the Service Mode as Day. Afterwards, if you and add a Night Routing Table, Call Center still recognizes the Service Mode as Day. You must set the Service Mode to Auto to get Call Center to function in the Auto Service Mode.

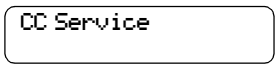
To set the Service Mode for a skillset



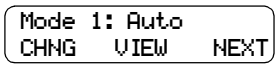
1 Press 9 8 2 .
Enter the default Operator password 6 7 3 7 2 8 6 7 , (Operator) and press OK
or
if you changed the default Operator password, enter the new password and press OK.



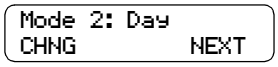
2 Press MODE.



3 This display appears briefly.



4 The display shows the Service Mode for skillset 1.
In this example, skillset 1 is in Auto mode.
Press CHNG if you want to change the Service Mode to Day or Night
or
press VIEW if you want to view the details for the Service Mode
or
press NEXT if you have a Day Routing Table for skillset 2.



5 The display shows the Service Mode for skillset 2.
In this example, skillset 2 is in Day mode.
Press CHNG if you want to change the Service Mode to Day or Night
or
press NEXT to view the next skillset.

While you view the skillsets, you can press:

- 1 and then enter the skillset number to view a specific skillset. If you use Basic Call Center you have 2 skillsets. If you use Professional Call Center you have 50 skillsets.
  - If you want to view a skillset from 1 - 9, enter the skillset number and then press OK.
  - If you want to view a skillset from 10 - 50, just enter the number of the skillset.
  - If you want to return to the previous display press QUIT.
  - If you want to re-enter the skillset number, press RETRY.
- 4 to view the previous skillset.
- 3, 6, # or NEXT to view the next skillset
- * to exit

6 The session ends when you press * or .

Note: Remember to manually choose the Day Routing Table or the Auto Service Mode when your business returns to regular hours.

Example of a Day Routing Table

To set up the routing table steps is shown in "Example of Day Routing Table steps", follow the procedure "To set up the Day Routing Table example".

Example of Day Routing Table steps

Step number	Type of step	Step parameters
1	Greeting	Greeting 1, information greeting Forced Transfer none enabled
2	Distribute for	1:00 (one minute)
3	Greeting	Greeting 2, general company greeting Not forced play Intelligent Call Input Routing, Basic with defaults
4	Distribute for	Accept default - distribute for 00:30 (thirty seconds)
5	Greeting	Greeting 3, please wait greeting Not forced play Intelligent Call Input Routing, Basic with operator default
6	Goto	Routing Table step 2

To set up the Day Routing Table example

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List link appears.
4. Click the **Day** link for Skillset 1.
   The Day Routing Table page appears.
5. Click the **Insert** link.
   The Routing Step page appears.
   Greeting 1 is assigned by default.
6. Select the **Forced Play** check box.
7. At the **Intelligent Caller Input Routing** option select **None**.
8. Click the **Submit** button.
   The Greeting step appears as step 1 in the Day Routing Table list.
9. Click the **Insert** link for the **End** step.
   The Routing Step page appears.
10. Click the **Distribute for** option.

11 In the **Distribute for** box enter the time **01:00**.

12 Click the **Submit** button.
The Distribute For step appears as step 2 in the Day Routing Table list.

13 Click the **Insert** link for the **End** step.
The Routing Step page appears.
The Greeting option is selected by default.

14 In the **Greeting** box type **2**.

15 At the **Intelligent Caller Input Routing** option, select **Basic**.
The Auto-Attendant, Operator, Skillset Mailbox and CCR check boxes are selected by default.
The default DTMF digits for each destination are shown.

16 Click the **Submit** button.
The Greeting step appears as step 3 in the Day Routing Table page.

17 Click the **Insert** link for the **End** step.
The Routing Step page appears.

18 Select the **Distribute for** option.
The default time of 00:30 is shown in the Distribute for box.

19 Click the **Submit** button.
The Distribute for step appears as step 4 in the Day Routing Table list.

20 Click the **Insert** link for the **End** step.
The Routing Step page appears.
Greeting is selected by default.

21 In the **Greeting** box type **3**.

22 At the **Intelligent Caller Input Routing** option select **Basic**.

23 Clear the **Auto-Attendant**, **Skillset Mailbox** and **CCR** check boxes so that just the **Operator** check box is selected.

24 Click the **Submit** button.
The Greeting step appears as step 6 in the Day Routing Table list.

25 Click the **Insert** link of the **End** step.
The Routing Step page appears.

26 Select the **Goto step** option.

27 From the **Goto step** list box select **2**.

28 Click the **Submit** button.
The Goto step appears as step 6 in the Day Routing Table list.

29 Click the **Close** button to return to the Skillset List page.

Example of a Night Routing Table

To set up the routing table steps shown in "Example of Night Routing Table steps", follow the procedure "To set up the Night Routing Table example".

Example of Night Routing Table steps

Step number	Type of step	Step parameters
1	Greeting	Greeting 6, non-business hours greeting Not forced play Intelligent Call Input Routing, Basic
2	Disconnect	There are no parameters for the Disconnect option.

To set up the Night Routing Table example

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Night** link for Skillset 1.
   The Night Routing Table page appears.
5. Click the **Insert** link.
   The Routing Step page appears.
   The **Greeting** option is selected by default.
6. In the **Greeting** box, type **6**.
7. At the **Intelligent Caller Input Routing** option, select **Basic.**
8. Click the **Submit** button.
   The Greeting step appears as step 1 in the Night Routing Table list.
9. Click the **Insert** link for the **End** step.
   The Routing Step page appears.
10. Select the **Disconnect** option.
11. Click the **Submit** button.
    The Disconnect step appears as step 2 in the Night Routing Table list.
12. Click the **Close** button to return to the Skillset List page.

Changing a Routing Table

You must disable a skillset before you can change its routing table.
For how to disable a skillset refer to "Disabling a skillset" on page 59.

To	Follow the procedure
Insert steps	"Adding a Greeting step" on page 138 "Adding a Distribute for step" on page 141 "Adding a Goto step" on page 142 "Adding a Transfer step" on page 143 "Adding a Disconnect step" on page 144
Review steps	"Reviewing Routing Table steps" on page 152
Modify steps	"Modifying Routing Table steps" on page 152
Delete steps	"Deleting Routing Table steps" on page 153

Reviewing Routing Table steps

You can review the steps for enabled skillsets.

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** link.
   The Skillset List page appears.
4. Click the **Day** or **Night** link for the skillset whose routing table steps you want to review.
   The Day or Night Routing Table page appears.
5. Click the **View** link to view the steps.
6. After you review the steps, click the **Close** button.

Modifying Routing Table steps

You must disable a skillset before you can modify its routing table steps.
For how to disable a skillset refer to "Disabling a skillset" on page 59.

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Skillset List** heading.
   The Skillset List page appears.
4. Click the **Day** or the **Night** link for the skillset with the routing table you want to change.
   The Day or the Night Routing Table page appears for the skillset.

5 Click the **Modify** link for the step you want to change.
The Routing Step page appears.

6 Make the changes you want to the routing table step.

7 Click the **Submit** button.
The changed step appears in the Routing Table list.

8 Click the **Close** button to return to the Skillset List page.

Deleting Routing Table steps

You must disable a skillset before you can delete its routing table steps.
For how to disable a skillset refer to "Disabling a skillset" on page 59.

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset with the step you want to delete.
The Day or the Night Routing Table page appears for the skillset.

5 Click the **Delete** link for the step you want to delete.
A message appears that asks you to confirm the deletion.

6 Click the **OK** button.
The step is deleted from the Routing Table list.

7 Click the **Close** button to return to the Skillset List page.sss

Chapter 11
Creating Caller Input Rules

If you use Professional Call Center, you can create Caller Input Rules that route calls to other skillsets or locations based on caller multi-digit DTMF input. Caller Input Rules let you identify callers depending on what kind of services your call center has. For example, callers can enter a passcode to access a special service line. Refer to "An example of using Intelligent Caller Routing, Advanced" on page 159 for an example of how to use Caller Input Rules in your call center.

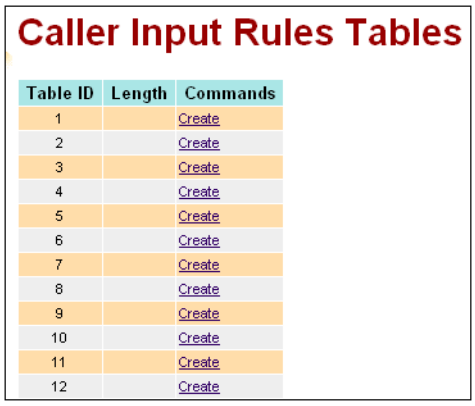
If you use Professional Call Center you have 50 Caller Input Tables. You do not have Caller Input Tables if you use Basic Call Center.

You can create up to 2,000 Caller Input Rules for each table. Each rule has a Match String, and an Action. The Match String is the string of digits that is checked, and the Action is the routing applied to calls that match the rule. The list of Caller Input Rules is sorted numerically by Match String. If strings overlap, longer, more-specific strings appear before shorter, less-specific strings.

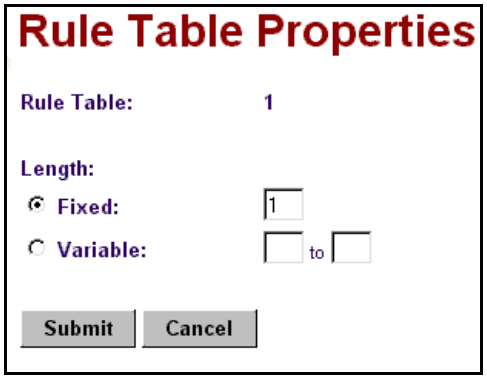
Note: When you record the greetings you want to use for Caller Input, include that the caller must press # after they enter their input. For example, *"If you have a personal identification number, please enter it now, followed by the # key."*

Creating a Caller Input Rule

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.



4 Click the **Create** link for the Caller Input Rules Table you want to add a rule to.
The Rule Table Properties page appears.

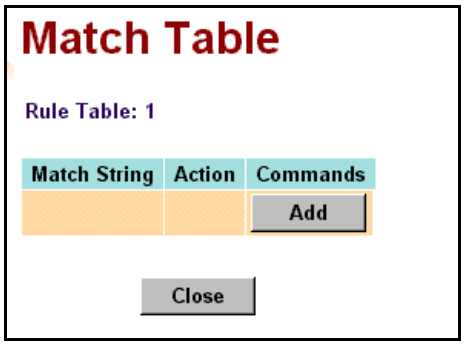


5 Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:

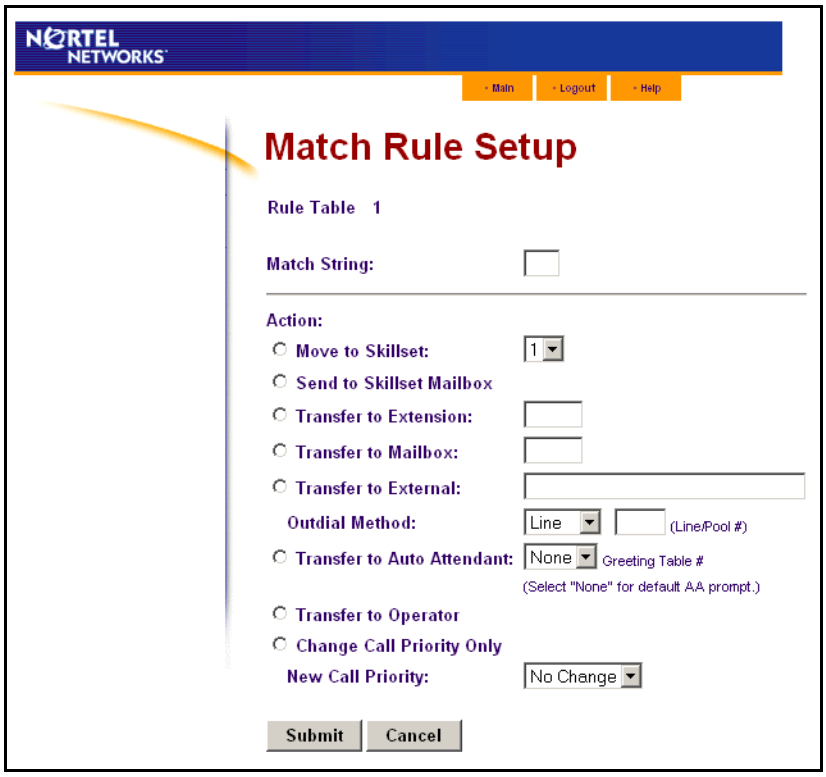
- If you select **Fixed**, in the **Fixed** box enter the number of digits allowed.
  The fixed length can be from 1 to 50 digits.
- If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.

6 Click the **Submit** button.
You return to the Caller Input Rules Tables page.

7 Click the **Rules** link for the table you want to create a rule for.
The Match Table page appears.



8 Click the **Add** button.
The Match Rule Setup page appears.



9 In the **Match String** box type the string you want to match.
You can use # and * as wildcard characters.
For information on using wildcard characters refer to "Using wildcard characters" on page 159.

10 Select an action for how you want to route the call:

- if you want to transfer the call to another skillset:
  - — select **Move to Skillset**
  - — from the list box select the number of the skillset you want to transfer the call to.
  - — if you want to change the priority of the call, select a number between 1 and 20 from the **New Call Priority** list box. The default is 10.
- if you want to transfer the call to the skillset mailbox, select **Send to Skillset Mailbox**
- if you want to transfer the call to an extension, select **Transfer to Extension** and in the box type the extension number you want to transfer the call to
- if you want to transfer the call to a mailbox, select **Transfer to Mailbox** and in the box type the mailbox number you want to transfer the call to
- if you want to transfer the call to an external number:
  - — select **Transfer to External**
  - — in the box type the number you want to transfer the call to
  - — from the **Outdial Method** list box select an outdial method

— if you select Line or Pool, in the **Line/Pool#** box type the line or line pool number used

- if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant** and select a Greeting Table to transfer the call to, or select None to transfer the call to the default Auto Attendant prompt.
- if you want to transfer the call to the operator, select **Transfer to Operator**
- if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to

Note: You or the System Administrator must set up a CCR Tree before you can select it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

- if you want the call to remain in its skillset but you want to change the call's priority within the skillset, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority between 1 and 20 for the call. The default is 10.

11 Click the **Submit** button.
The rule you created appears in the Match Table.
Repeat steps 8 through 11 if you want to add another rule to the table
or
click the **Close** button to return to the Caller Input Rules Tables page.

Using wildcard characters

You can use the wildcard characters # and * in the match string:

- # matches any single digit
- * matches zero or more digits

When you use the * wildcard character:

- it can appear only once in a match string
- it can appear only at the end of a match string
- it cannot be the only character in a match string

Some examples of using wildcard characters in the match string:

1111##	Matches all account numbers 111100 to 111199
########	Matches a credit card number with the correct number of digits
#*	Matches all valid input greater than 1 character

An example of using Intelligent Caller Routing, Advanced

The call center of Bridgestone Computers uses Intelligent Caller Routing, Advanced and Caller Input Rules to give some callers access to a special service line. Bridgestone Computers uses Professional Call Center, which gives them Intelligent Caller Routing, Advanced functionality.

Customers who purchase equipment that is under warranty have an eight-digit personal identification number. When they call Bridgestone Computers' service line and enter their personal identification number, their call receives priority handling in the call center.

Here is how their call is handled:

1. The caller hears the greeting for the service line, which includes *"If you have a personal identification number, please enter it now, followed by the # key."*
2. The caller enters their personal identification number.
3. If the caller enters their number incorrectly, the greeting can be repeated as many as three times, which is the number of retries the Call Center Administrator has set for Retries in Intelligent Caller Routing, Advanced.
4. If the caller enters their number correctly, Call Center compares the caller's personal identification number with the Match String in the rules for Rules Table 1.
5. For Rules Table 1, the Call Center Administrator created a rule of a fixed length of eight digits because all personal identification numbers are eight digits long.

6 The Call Center Administrator created three rules for Rules Table 1:

- rule 4709####. Customers with servers have a personal identification number that begins with 4709
- rule 5709####. Customers with desktop computers have a personal identification number that begins with 5709
- rule 6709####. Customers with laptop computers have a personal identification number that begins with 6709

7 The callers' personal identification number is 67095233, which matches the rule for laptop computers.

8 The Call Center Administrator set up the rules in Rules Table 1 with these Actions:

- a match for 4709#### sends callers to skillset 1 (servers) and changes the call priority to 1
- a match for 5709#### sends callers to skillset 2 (desktops) and changes the call priority to 1
- a match for 6709#### sends callers to skillset 3 (laptops) and changes the call priority to 1

9 The call enters skillset 3. Skillset 3 is the priority service skillset for laptops.

Changing a Caller Input rule

You can change a caller input rule at any time. If you want to change the length for the rules in a Caller Input table, refer to "Changing the rule length for a Caller Input Table" on page 162. If you want to change a specific rule in a table, refer to "Changing a Caller Input Rule" on page 163.

Changing the rule length for a Caller Input Table

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Change** link for the table you want to change.
   The Rule Table Properties page appears.
5. Make the appropriate change to the length. Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:
   - If you select **Fixed**, in the **Fixed** box enter the number of digits allowed.
     The fixed length can be from 1 to 50 digits.
   - If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.
6. Click the **Submit** button.

Changing a Caller Input Rule

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Rules** link for the table that has the rule you want to change.
   The Match Table page appears.
5. Click the **Change** link for the rule you want to change.
   The Match Rule Setup page appears.
6. Make the changes you require to the Match String or Action.
7. Click the **Submit** button.
   The Match Table page appears with the changed rule.
8. Click the **Close** button to return to the Caller Input Rules Tables page
   or
   repeat steps 5 through 7 to change another rule.

Deleting a Caller Input rule

You can delete a Caller Input rule at any time.

To delete a Caller Input rule

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Rules** link for the table with the rule you want to delete.
   The Match Table page appears.
5. Click the **Delete** link for the rule you want to delete.
   A message appears that asks you to confirm the deletion.
6. Click the **OK** button.
   The rule is deleted from the Match Table list.
7. Click the **Close** button to return to the Caller Input Rules Tables page.

Clearing a Caller Input Rule Table

If you clear a Caller Input Rule Table, you delete all the rules and rule length information from the table.

To clear a Caller Input Rule Table

1. Start CallPilot Manager.
2. Click the **Call Center** heading.
3. Click the **Caller Input Rules** link.
   The Caller Input Rules Tables page appears.
4. Click the **Clear** link for the table you want to clear.
   A message appears that asks you to confirm the deletion.
5. Click the **OK** button.

Chapter 12
Line administration

Before Call Center can answer an incoming line, you must assign the line to be answered by a Call Center skillset. Refer to "A comparison of Basic and Professional Call Center" on page 15 for information on how many lines you can configure for your call center. The line numbers can be any line number from 1 to 500.

For each line that you want Call Center to answer, you assign:

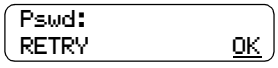
- the line to be answered by Call Center
- the skillset that calls on this line go to
- the number of rings before the line is answered

You can record your line answering information in the table "Line answering" on page 262.

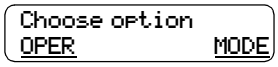
Setting the Answer Lines status

The Answer Lines status determines whether Call Center answers the assigned lines. If the Answer Line status is set to Yes, Call Center answers the lines assigned as Call Center and CallPilot answers the lines assigned as AA. If the Answer Line status is set to No, neither Call Center nor CallPilot answers lines.

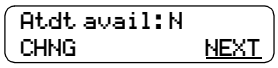
To set the Answer Lines status



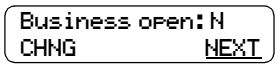
1 Press [ ] [9] [8] [2].
Enter the Operator password, and then press OK.



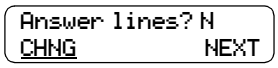
2 Press OPER.



3 Press NEXT



4 Press NEXT.



5 Press CHNG.
If you set Answer Lines to N the display shows Disabling...
If you set Answer Lines to Y the display shows Enabling...

6 Press [ ] to end the session.

Configuring lines

You must disable a skillset and wait until there are no calls in the skillset before you can add lines to it. You cannot add lines to a skillset while it is in use.

Note: Target lines that are assigned to a B2 skillset cannot have their DN programmed as the Control DN of the skillset. This is restricted by the software. The recommended setting for these lines is blank.

For information on how to program the prime extension, refer to the *Business Communications Manager Programming Operations Guide* or the *Norstar System Coordinator Guid*e.

Lines that are programmed to be answered by Call Center must not be programmed to be answered by another peripheral or application.

To delay calls being answered, you can assign Call Center to answer incoming calls after a specified number of rings. The number of rings ranges from zero to 12. If you choose zero rings, the caller might hear one ring. Zero rings means the call is answered as soon as possible.

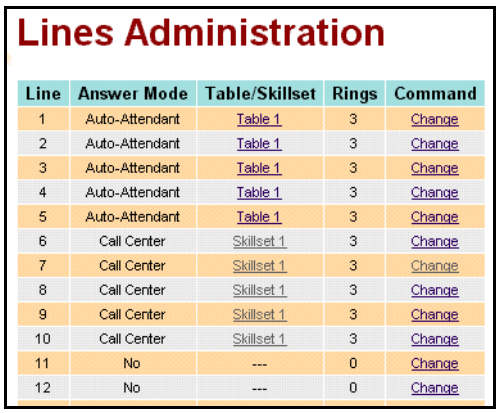
For lines equipped with Caller ID, you must set the number of rings to two or more. Caller ID information is not provided until just prior to the second ring, so if you set the number of rings to zero or one, Caller ID information is not relayed.

Long distance charges start when a call is answered by Call Center. To minimize long distance charges, set the ring count higher than 0 so that calls spend more waiting time in a ringing state.

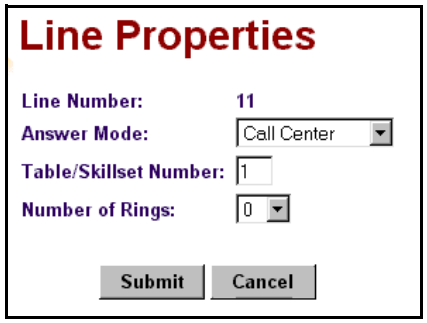
To configure a line

1 Start CallPilot Manager.

2 Click the **Auto-Attendant** heading.
The Lines Administration page appears.


Lines Administration
Line
Answer Mode
Table/Skillset
Rings
Command
1 Auto-Attendant Table 1 3 Change
2 Auto-Attendant Table 1 3 Change
3 Auto-Attendant Table 1 3 Change
4 Auto-Attendant Table 1 3 Change
5 Auto-Attendant Table 1 3 Change
6 Call Center Skillset 1 3 Change
7 Call Center Skillset 1 3 Change
8 Call Center Skillset 1 3 Change
9 Call Center Skillset 1 3 Change
10 Call Center Skillset 1 3 Change
11 No --- 0 Change
12 No --- 0 Change

3 Click the **Change** link for the line you want to assign to a skillset.
The Line Properties page appears.



4 From the **Answer Mode** list box, select **Call Center**.

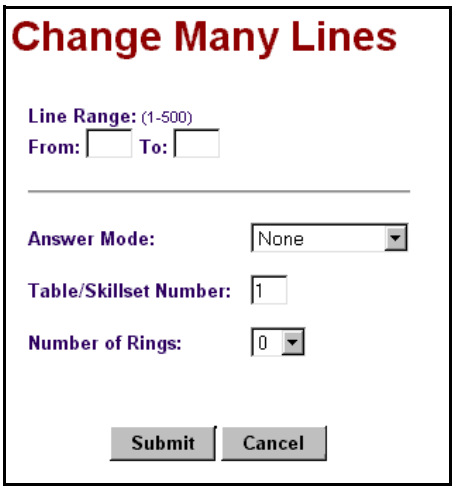
5 In the **Table/Skillset Number** box type the number of the skillset you want to answer this line.

6 From the **Number of rings** box select the number of rings before Call Center answers.
You must select a number from 0 to 12.

7 Click the **Submit** button.

Configuring several lines

1. Start CallPilot Manager.
2. Click the **Auto-Attendant** heading.
3. Click the **Change Many Lines** link.
   The Change Many Lines page appears.



4. In the **From** box type the number of the first line to add.
5. In the **To** box type the number of the last line to add.
6. From the **Answer Mode** list box select **Call Center**.
7. In the **Table/Skillset Number** box type the number of the skillset you want to answer these lines.
8. From the **Number of rings** list box select the number of rings before Call Center answers. You must select a number from 0 to 12.
9. Click the **Submit** button.

Chapter 13
Setting up Call Center general properties

Setting up Call Center includes assigning the language and setting up general Call Center properties.

You can generate a System Configuration Report to see a snapshot of your Call Center settings.

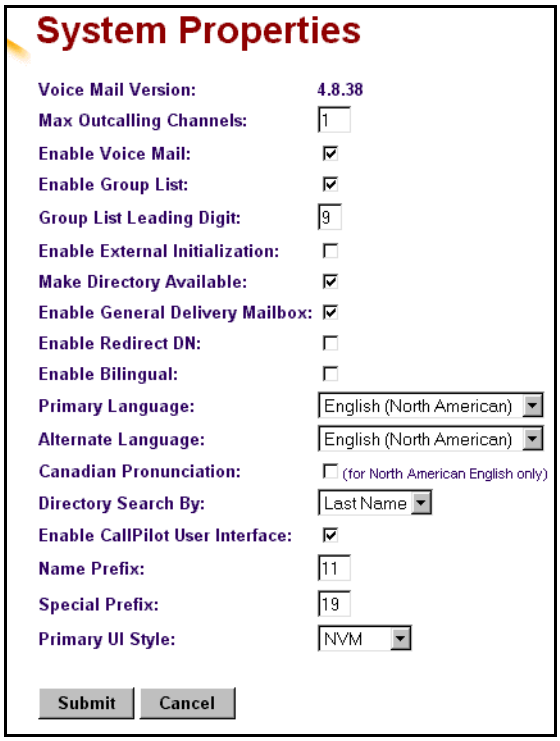
You can enable Software Authorization Codes if you want to increase the number of agents at your call center or enhance your call center with options such as Multimedia Call Center.

Assigning the Call Center language

The languages available for Call Center are the languages that are available for CallPilot. If you change the Call Center language, you also change the CallPilot language.

To assign the Call Center language

1. Start CallPilot Manager.
2. Click the **Configuration** heading.
3. Click the **System Properties** link.
   The System Properties page appears.



4. If you want to use a Primary and an Alternate language, select the **Enable Bilingual** check box. If you clear this check box alternate language prompts are not available.
   Disabling bilingual operation affects:
   - language designations for Automated Attendant greetings
   - voice prompt selections for callers who use the Automated Attendant
   - voice prompt selections for callers who transfer to mailbox greetings
5. Select a primary language from the **Primary Language** list box.
   Prompting for the Automated Attendant and CCR Trees occurs in this language.
6. Select an alternate language from the **Alternate Language** list box.
   The alternate language cannot be the same as the primary language.
7. Select the **Canadian Pronunciation** check box if you want voice prompts that include the letter "z" to be pronounced "zed" instead of "zee". The Canadian Pronunciation check box appears only if North American English is the primary or alternate language.
8. Click the **Submit** button.

General Call Center properties

When you set up Call Center you must assign values for the general properties. The general Call Center properties are:

Primary and Secondary alert times

Alert times are time limits for calls waiting in skillsets. The Secondary alert time must be a greater than the Primary alert time. You can have Primary and Secondary alerts for all the calls in the call center, or for just the calls waiting in skillsets that you are logged on to.

If a call exceeds the Primary alert time:

- a memory button indicator programmed with Display Waiting Calls (9 0 9) flashes slowly. 9 0 9 flashes based on the status of all the calls in the call center.
- a memory button indicator programmed with Agent Login (9 0 4) flashes slowly. 9 0 4 flashes based on the status of the calls for the skillsets an agent is logged on to.

If a call exceeds the Secondary alert time:

- a memory button indicator programmed with Display Waiting Calls (9 0 9) flashes quickly. 9 0 9 flashes based on the status of all the calls in the call center.
- a memory button indicator programmed with Agent Login (9 0 4) flashes quickly. 9 0 4 flashes based on the status of the calls for the skillsets an agent is logged on to.

A slowly flashing indicator alerts you that a call has exceeded the Primary alert time. A quickly flashing indicator alerts you that a call has exceeded the Secondary alert time. The indicator stops flashing when the calls are handled.

You assign alert times in minutes and seconds. There is no default value for alert times.

For how to program a memory button, refer to "Programming a memory button with a Feature Code" on page 30.

Note: Agents do not have to be logged on to see the Display Waiting Calls memory button flashing. A memory button must be programmed with the Display Waiting Calls Feature Code and the Primary alert time must be set up for the memory button to show waiting calls status.

Reserved channels

Reserved channels are voice channels that are reserved for use by Call Center. If you reserve channels you ensure that callers are played skillset announcements, and CallPilot does not use all of the voice channels.

A reserved channel is used when:

- a Call Center greeting plays to a caller
- Off-premise Message Notification notifies you that there is a message in a skillset mailbox

Call Center Reporting properties Address

The Call Center Reporting properties let you control who can access Call Center Reporting, and whether information from the data stream is collected.

Supervisor Help Request Timeout

The Supervisor Help Request Timeout is when to escalate a request if a chosen supervisor does not answer the help request. You can choose a value from 1 to 60 seconds. The default is 12 seconds.

For more information about Supervisor Help refer to "Supervisor Help" on page 189.

Selection Method (Supervisor Help From)

The Supervisor Help From setting lets you determine where supervisors for escalated requests are chosen from. For more information about Supervisor Help refer to "Supervisor Help" on page 189.

All skillsets	sends an unanswered help request system-wide to all Call Center supervisors.
Agent's skillsets only	sends an unanswered help request to only the supervisors assigned to skillsets that the agent is logged on to.

Note: If you use a CallPilot system, Supervisor Help is not available.

Enable Caller ID

The **Enable Caller ID** options let you select how you want caller ID information to be displayed on agent telephones:

- **Name with number backup**: displays the caller's name for 3 seconds and then the skillset name. If the caller's name is not available, the caller's number is shown.
- **Number only**: displays the caller's number for 3 seconds and then the skillset name.
- **None**: displays the skillset name.

Setting up general Call Center properties

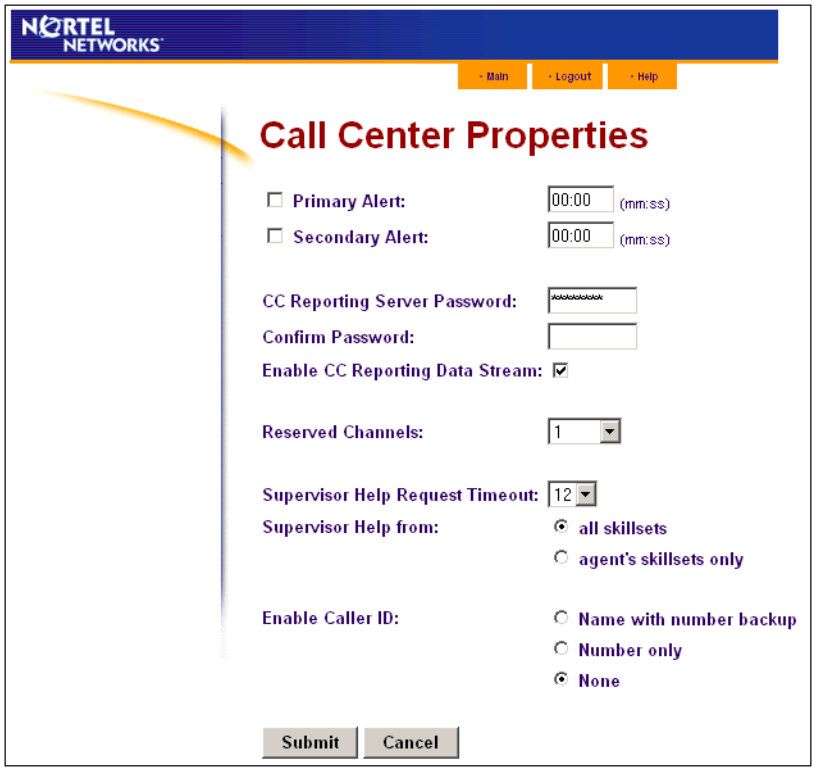
For information about the general Call Center properties refer to "General Call Center properties" on page 171.

To set up the general Call Center properties

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **General Properties** link.
The Call Center Properties page appears.



4 To enable the Primary Alert, select the **Primary Alert** check box and enter the Primary Alert time.

5 To enable the Secondary Alert, select the **Secondary Alert** check box and enter the Secondary Alert time. The Secondary Alert time must be greater than the Primary Alert time.

6 If you use Call Center Reporting, in the **CC Reporting Server Password** box type the password that Call Center Reporting users must enter to collect data. Type the password again in the **Confirm Password** box.

7 If you use Call Center Reporting, select the **Enable CC Reporting Data Stream** check box to enable reporting data to be collected.

8 From the **Reserved Channels** list box select the number of voice channels you want to reserve for Call Center.

9 From the **Supervisor Help Request Timeout** list select a value between 1 and 60 seconds. The default is 12 seconds.

10 From the **Supervisor Help from** options select **all skillsets** or **agent's skillsets only**.

11 From the **Enable Caller ID** options select how you want caller information to be displayed on agent telephones:

- **Name with number backup**: displays the caller's name for 3 seconds and then the skillset name. If the caller's name is not available, the caller's number is shown.
- **Number only**: displays the caller's number for 3 seconds and then the skillset name.
- **None**: displays the skillset name.

12 Click the **Submit** button.

System Configuration Report

The System Configuration Report includes information about Call Center configuration.

The Call Center information in the System Configuration Report:

Call Center Parameters	Lists the current Call Center general parameters.
Multimedia Call Center Properties	• whether Multimedia Call Center is enabled • Server Address • Server Port
Call Center agents	Lists for each agent: • Agent ID • Agent Name • Skillsets assigned • Priority • Supervisor status • Automatic answer • Call type • Missed call • Activity Code Entry Type
Call Center skillsets	Lists for each skillset: • Skillset ID • Skillset Name • Control DN • Message Waiting Indicator extension • Method of Call Distribution • Break time • Delay answer time • Language type • Attd Ext • EWT# Calls • EWT Init Call Dur • ActEntry Type
Call Center Routing Tables	Lists for each skillset: • Skillset number • Day Routing Table start time • Night Routing Table start time • Day Routing Table steps • Night Routing Table steps

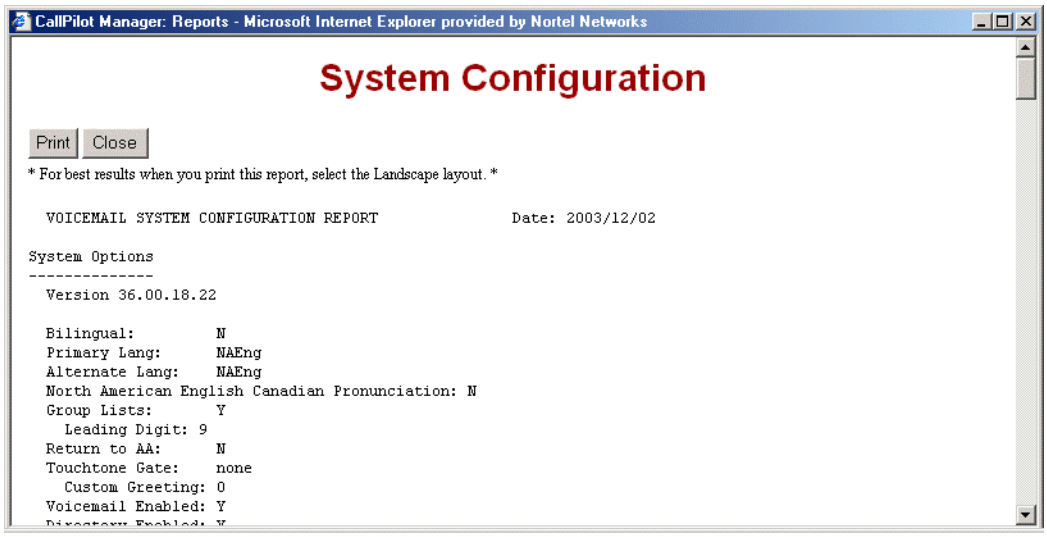
Call Center overflow	• Skillset number • Skillset name • Enabled or disabled • Rule • Service Mode • Conditions • Actions
Call Center Greetings	Lists for each call center greeting: • Greeting number • Status (whether the greeting is recorded) • Caption • Skillsets that use the greeting
Call Center Intelligent CLID/ DNIS Routing	• Line • CLID/ANI number • DNIS number • Action
Call Center Intelligent Caller Input Routing Tables	• Length of rule • Match string • Action
Expected Wait Time	EWT Greetings: • EWT Greeting Table Number • Wait Time Interval • Greeting ID
Activity Codes	• ID • Name • Description
Enable Caller ID	• Name with number backup, number only, or none
Line Answering	• Line • Rings • Table • Skillset

To generate the System Configuration Report

1 Start CallPilot Manger.

2 Click the **Reports** heading.

3 Click the **System Configuration** link.
The System Configuration Report appears. It can take several minutes to generate the report.


CallPilot Manager: Reports - Microsoft Internet Explorer provided by Nortel Networks
System Configuration
Print
Close
* For best results when you print this report, select the Landscape layout. *
VOICEMAIL SYSTEM CONFIGURATION REPORT Date: 2003/12/02
System Options
Version 36.00.18.22
Bilingual: N
Primary Lang: NAEng
Alternate Lang: NAEng
North American English Canadian Pronunciation: N
Group Lists: Y
Leading Digit: 9
Return to AA: N
Touchtone Gate: none
Custom Greeting: 0
Voicemail Enabled: Y

4 To print the report, click the **Print** button.

5 When you are finished printing or viewing the report, click the **Close** button.

Chapter 14
Monitoring Call Center call activity

Monitoring call activity

There are two ways that you can monitor call activity at your call center:

- "Monitoring agent calls with Silent Monitor" on page 179
- "Monitoring skillsets" on page 185

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets [✆] [9] [0] [9]
- Monitor agent calls [✆] [9] [0] [5].
  NOTE: To use [✆] [9] [0] [5], you must program it to a memory button and press the [✆] [9] [0] [5] memory button to monitor agent calls.

For how to program a memory button, refer to "Programming a memory button with a Feature Code" on page 30. For information about monitoring capacities refer to "A comparison of Basic and Professional Call Center" on page 15.

Monitoring agent calls with Silent Monitor

Note: If you use a CallPilot platform, you can monitor calls using [✆] [9] [0] [5] but Silent Monitor is not available.

When you monitor calls as a Silent Monitor, you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session. You must be logged on before you can monitor calls.

Note: While you monitor an agent's calls you monitor all of their calls, including their personal calls. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

You must program a memory button with [✆] [9] [0] [5], and then press the [✆] [9] [0] [5] memory button to monitor calls. If the memory button you choose has an indicator, the indicator shows your log on status. You do not have Call Center calls sent to you while you use [✆] [9] [0] [5].

Setting up Silent Monitor on your system

For monitoring to be silent, you must have Silent Monitor set up in Unified Manager. To do this, you must be familiar with using the Business Communication Manager Unified Manager. If you do not have access to the Unified Manager, ask your system administrator to set up Silent Monitor.

To set up Silent Monitor

1. In Unified Manager, click the **Services**, **Telephony Services** and **General Settings** keys.
2. Click the **Silent Monitor** heading.
3. From the **Monitoring Mode** list box, select **Silent**.
4. Press your keyboard's Tab key to save your changes.
5. Log off Unified Manager.

Note: If the Silent Monitor setting in Unified Manager is set to non-silent there is a conference tone at the start of calls that you monitor, therefore monitoring isn't silent.

Note: In the UK the default for Silent Monitor is non-silent. In North America the default is silent.

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone, the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time.
- While you are on a call, do not initiate a monitoring session.
- You must use a two line display telephone.
- Use a headset rather than handsfree when you monitor calls. This ensures call privacy and reduces the office noise level. Check the documentation for your telephone to make sure that you can use a headset with it.

Note: You cannot monitor an agent who is:

- on a conference call
- using an Answer DN
- on an ISDN or Companion set
- on any type of call if the maximum number of conference bridges (6) are being used

Logging on and monitoring agent calls

You must be logged on to monitor and answer calls. You cannot log on if the maximum number of agents is logged on, if you are logged on to another telephone, or if someone else is logged on to your telephone. You can log on only to skillsets that you are assigned to.

1. Press [✆] [9] [0] [4].
2. Enter your Agent ID number and press OK or [#].
3. Enter your password and press OK or [#].
   The default password you enter to log on for the first time, or if your password is reset, is 0000. If you enter the default password, you must change your password. Enter a new password from four to eight digits long and press OK. Enter your new password again and press OK.
4. Press IN to log on to one or more skillsets that you want to monitor. You can monitor only the agents who are logged on to the same skillset as you. If IN does not appear, you are already logged on to all the skillsets or there are no skillsets available.
5. Press CHNG until the skillset you want to log on to appears on the display. The skillsets that are available are the skillsets that are assigned to you. If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.
6. Press OK. The display briefly confirms the skillsets that you are logged on to.
7. Press [☎].
   You are now logged on and can accept calls like a Call Center agent.
8. To begin monitoring agent calls press the memory button programmed with [✆] [9] [0] [5].
   After you press [✆] [9] [0] [5] Call Center does not route calls to you.
9. Press OK to accept the skillset shown or press NEXT or PREV to find the skillset you want to monitor.
10. Enter the Agent ID of the agent you want to monitor and press OK.
    Invalid Agent. appears if the agent is not assigned to you.
    You can press DIR to find the Agent ID in the Agent directory. You can monitor any agent logged into a skillset assigned to you.
11. Press INFO to display the Agent ID number, agent name, call state and the time in minutes and seconds that the call has been in this state. Call states include Idle, Not Ready, and Break (Incall, Outcall, Browse, AnsDN, Ringin).
12. Press INFO a second time to display the Agent ID number, agent name, and monitoring options again.
13. Press OBSV to monitor an agent. If another supervisor is monitoring the agent the OBSV button does not appear. At any time you can press the CANCL button to exit the monitoring session without logging off. If the agent has no active call, has a call on hold, or is on a conference call, you hear silence. You do not begin to monitor the agent until the agent takes a call, takes the call off hold, or ends the conference call.

14 If you want to join the call, press JOIN.
You can press MUTE to mute your voice while you monitor.
NOTE: If you use CallPilot 100/150, Join and Mute do not appear, but Info does instead.

15 To end the monitoring session press CANCL.
If you want to monitor another agent in the skillset press NEXT until you see the agent you want to monitor, and then press OBSV.

You can program a memory button with ✆ 9 0 4. If the memory button you choose has an indicator, the indicator shows your log on status.

- If the indicator is off, you are logged off.
- If the indicator is on, you are logged on.

An agent requests help while you are in a monitoring session

While you monitor an agent, the agent can request Supervisor Help if it is available on your system. If an agent requests help, you are automatically selected to help and assumed to have accepted the request. When you are done, the Supervisor Help session ends and your original monitoring session resumes where it left off.

About monitoring sessions

Receiving a call on your telephone	If you are monitoring an agent and you get a call on your telephone, the monitoring session ends if you answer the call. When you end your call, you can press OBSV to reenter the monitoring session with the agent.
Making a call while monitoring	If you make a call while you are monitoring an agent, the monitoring session ends and you must begin monitoring using ✆ 9 0 5 to reestablish a monitoring session.
Ending a session by logging off	The session ends if you or the agent are forced to log off or if the agent logs off voluntarily. If the agent is on a call at the time of log off, but you are still logged on and monitoring, the session continues until the call is disconnected or you press CANCL.
Conference calls	If the agent puts the a call that you are monitoring into a conference call, you do not hear the call for the duration of the conference call. When the agent goes out of conference, you are automatically monitoring the agent again. **NOTE:** If you want to monitor agents all the time, ask agents not to participate in conference calls.
On hold calls	If the agent puts a call that you are monitoring on hold, you do not hear the call while it is on hold. When the agent resumes the call, you are automatically monitoring the agent again. If an agent puts one call on hold and answers another call, you can monitor only the currently active call. When the agent switches back to the first call, this becomes the active call that you are monitoring.
Using VoIP telephones	Silent monitoring is not recommended if **both** of the parties being monitored are on an IP device, that is if your Call Center uses both IP trunks and agent IP sets, or if the caller is using an IP set. If the agent is on an IP set and the caller is on an IP trunk, there is a noticeable interruption in audio for approximately 1 second when supervisor monitoring starts. This is noticeable to the agent and the caller. On systems that do not have IP trunks **and** IP agents this does not occur.
Companion sets	You cannot monitor agents who are logged on to Companion sets.
ISDN sets	You cannot monitor agents who are logged on to ISDN (Integrated Services Digital Network) sets.
Maximum number of conference bridges	If the maximum number of simultaneous conference bridges (6) are being used, when you try to start a monitoring session your display shows “No conf avail”.
Transferred calls	If you are monitoring an agent and they transfer a call, you no longer hear the call.

Monitoring skillsets

Use [✆] [9] [0] [9] (Display Waiting Calls) to view information about skillsets and the calls waiting in skillsets. The table below describes the information in each display.

Display	Description
Skill 1: Enabled	the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	the skillset number and the number of calls waiting in the skillset
1: wait 9:45	the skillset number and the longest time a call has been waiting in the skillset.

Display Waiting Calls lets you know when a skillset in your call center gets very busy. You can then ask qualified agents to log on to the busy skillset.

To monitor skillsets

1 Press [✆] [9] [0] [9].
The skillset display for skillset 1 appears.

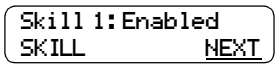
On a one line display telephone press	On a two line display telephone press	To
[1]	[1] or GOTO	enter the number of the skillset you want to monitor
[2]	[2] or SKILL	monitor the next enabled skillset
[3] or [6]	[3] or [6] or NEXT	go to the next skillset
[4]	[4] or PREV	go to the previous menu
[#]	[#]	go to the next menu
[*]	[*]	cancel the session
[☎]	[☎]	exit

Note: If at any time during a monitoring session you press a programmed memory key your monitoring session ends. Do not press a memory key unless you want to end your monitoring session.

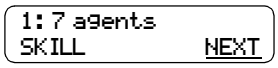
An example of monitoring skillsets

In the example shown here, there are calls waiting in skillset 1. In this situation, after you monitor the skillsets, you can ask the qualified and available agents from another skillset to log on to skillset 1 until the calls in skillset 1 are handled.

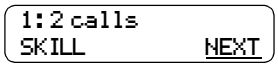
1 Press [ ] 9 0 9.



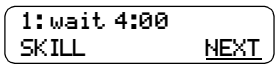
2 Press NEXT to monitor skillset 1.
In this example, skillset 1 is enabled and appears on the display first. If skillset 1 is not enabled, press NEXT to go to skillset 2. To monitor the next skillset, press SKILL at any time.



3 The display shows the number of agents logged on to skillset 1.
Press NEXT.



4 The display shows the calls that are currently waiting to be answered by agents in skillset 1.
Press NEXT.



5 The display shows that the call waiting the longest in skillset 1 has been waiting for four minutes.

6 Press [ ] to end the session
or
press NEXT to monitor skillset 2.

Using a memory button to monitor calls waiting in skillsets

Program a memory button with [ ] 9 0 9 to view the status of all skillsets, including the skillsets that you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset that you are logged on to. For how to program an memory button, refer to "Programming a memory button with a Feature Code" on page 30.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the first alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the second alert time.

For information on setting what the wait times are refer to "Setting up general Call Center properties" on page 173.

For information on Primary and Secondary alert times, refer to "Primary and Secondary alert times" on page 171.

Taking some Not Ready time

If you use [✆] [9] [0] [8] (Not Ready), you do not receive Call Center calls. You can program a Break Time, which makes Call Center automatically wait a short time before it routes the next call to you. You use Break Time to complete any tasks, such as paperwork, required by the last call. If you need some extra time, use Not Ready to prevent Call Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a memory button with an indicator instead of pressing [✆] [9] [0] [8].

For how to program a memory button, refer to "Programming a memory button with a Feature Code" on page 30. For more information about Break Time refer to "Break Time" on page 45.

Note: While you use Not Ready, you still receive non-Call Center, intercom and transferred calls.

Using Not Ready

1. Press [✆] [9] [0] [8]. `Make Not Ready` appears on the display.
   If you press [✆] [9] [0] [8] and `Break canceled` appears on the display, you canceled the Break Time that the Call Center Administrator programmed for you. You must press [✆] [9] [0] [8] again to activate the Not Ready feature.
   If you press [✆] [9] [0] [8] and `Agent active` appears, the Not Ready feature was on and you canceled it. Press [✆] [9] [0] [8] again to activate Not Ready.
2. When you are ready to take calls again, cancel the Not Ready feature by pressing [✆] [9] [0] [8].
   If `Not ready` appears, press [✆] [9] [0] [8] again.
   Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Call Center.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status:

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For how to program a memory button, refer to "Programming a memory button with a Feature Code" on page 30.

Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

1 From the display that shows your name on the top line, press OUT. The date and time display appears.
If OUT does not appear, you are not logged on to any skillsets.

Changing your supervisor password

Keep your password confidential. Change your password regularly, about every 30 days.

1 Press [feature] [9] [0] [4].

2 Enter your Agent ID number and press OK.

3 Enter your password and press OK.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.

4 Press ADMIN.

5 Enter a new password from four to eight digits long and press OK.

6 Enter your new password again and press OK.

7 Press [release].

Supervisor Help

With Supervisor Help an agent on a call can request help from a supervisor by pressing a programmed feature button. The agent can send an urgent request for help without interrupting the call, and without the caller being aware of the agent's help request.

Note: Supervisor Help is available for Business Communications Manager. It is not available for CallPilot 100/150.

Supervisor Help is for situations where an agent is on a call and urgently requires the help of a supervisor without alerting the caller that a supervisor is being called in. It is not intended for routine consultations or when the agent is not on a Call Center call.

A supervisor who receives a help request can accept, deny, or ignore it. A request that is denied or ignored is escalated, and a larger group of supervisors is notified of the request. A supervisor can choose to escalate a request so that it is broadcast to other supervisors who may be better able to handle the request. If a supervisor receives a request while they are not at their set, their [ ] 9 0 6 indicator flashes slowly to inform them of the missed request.

If a help request is escalated to a supervisor, their [ ] 9 0 6 indicator flashes quickly to inform them of the request. If the call for an escalated help request is still active, the supervisor can accept the request by pressing the [ ] 9 0 6 feature key. They do not have to be monitoring agents at the time, but can be answering Call Center calls.

Note: Supervisors who use Make Busy [ ] 9 0 8 are still available for help requests.

When a supervisor accepts an agent's request for help, a Silent Monitor session starts and the supervisor begins monitoring the agent's call. The agent who requested help is informed when the monitoring session begins. If the supervisor is already monitoring the call of the agent who requests help, the supervisor is considered to have accepted the request for help.

How Supervisor Help works

To use Supervisor Help supervisors must have a memory button programmed with the Supervisor Help feature code [ ] 9 0 6. The programmed key must have an LCD indicator. The memory button can have a distinct bright color so it can easily be distinguished from the other buttons. For how to program a memory button refer to "Programming a memory button with a Feature Code" on page 30.

When a supervisor is selected to answer an agent's help request, the supervisor's telephone rings once with a distinctive tone, and the Supervisor Help LCD indicator lights up and a message appears on the supervisor's display to accept or deny the call.

As soon as the supervisor accepts the request, Call Center starts a Silent Monitor session between the supervisor and the agent.

If the supervisor denies or ignores a help request, the request is escalated. The [ ] 9 0 6 indicator flashes quickly on the sets of all supervisors who are notified of the escalated request. Active escalated requests take precedence over missed requests, so the Supervisor Help LCD indicator does not flash slowly if there are active requests that have not been accepted.

An escalated request goes to supervisors as follows:

No supervisors are available	the request escalates to all potential supervisors. If escalation is system wide, a potential supervisor is any logged on supervisor. If escalation is skillset based, a potential supervisor is one who is logged onto the requesting agent's skillsets.
The request is denied by the selected supervisor	the request escalates to all potential supervisors except for the selected supervisor, unless the selected supervisor is the only potential supervisor.
The request is ignored	the request escalates to all potential supervisors.

Agents can request Supervisor Help only if they are on an active Call Center call. They cannot use Supervisor Help if they are not logged in, not ready, idle, have a call on hold, or are on a non-Call Center call. An agent can cancel Supervisor Help at any time before a supervisor answers the request.

When an agent requests Supervisor Help, Call Center looks for a single suitable supervisor to handle the request. If no supervisor is available, or the selected supervisor denies or ignores the request, the request is escalated. You set up supervisor selection to be either system wide or skillset based. System wide selection looks for all the available supervisors. Skillset based selection looks for only the supervisors who are assigned to the skillsets the agent is logged on to.

Configuring Supervisor Help

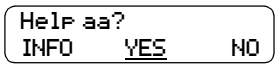
To set up Supervisor Help you must configure the general Call Center properties for request timeout and supervisor selection method.

For information about	Refer to
Programing Supervisor Help	"Setting up general Call Center properties" on page 173
Supervisor Help settings	"Supervisor Help Request Timeout" on page 172 "Selection Method (Supervisor Help From)" on page 172

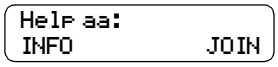
How to handle Supervisor help requests

Supervisors can program the Supervise feature (F906) onto a memory button of their telephone.

1 Launch Supervisor Help by pressing [ ] [9] [0] [6] or the F906 memory button on your telephone.



2 The display shows the ID of the agent who is requesting help.
Press YES to accept the agent request for help
or
press NO to escalate the request
or
press INFO to view the agent name, time and date of the request, caller ID and caller name of the agent's call.



3 The display shows the agent name.
While you monitor the agent, you can press the INFO key to view the time and date of the request, caller ID and caller name of the agent's call.
You can press the JOIN softkey or the MUTE button on your telephone to join in the call.
NOTE: Depending on what system you use, the Join and Mute softkeys may not appear.

4 When the help session is complete, press [ ] to end the session.

How to handle missed requests

When a supervisor's Supervisor Help LCD indicator is flashing, the supervisor can retrieve escalated or missed Supervisor Help requests.

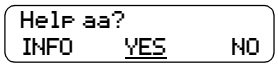
If there are one or more requests, Call Center shows all of the requests. Escalated requests for calls that are still active are shown first, from the oldest to most recent. After that, missed requests are shown from the oldest to the most recent.

A supervisor can accept the call by pressing the YES softkey. After the supervisor accepts the request, the request no longer appears to other supervisors who are retrieving help requests. Their displays show the next escalated request, or the first missed request if there are no more escalated requests, or "No help requests" if there are no more missed requests.

For a missed request, the prompt "aa:aname asked" appears, and the supervisor can retrieve information about the call by pressing the INFO softkey, or can move to the next request by pressing the NEXT softkey.

An example of retrieving an escalated request

The supervisor launches the Supervisor Help feature by pressing the Supervisor Help (F906) feature key.



1. Launch the Supervisor Help feature by pressing ✆ 9 0 6 or the F906 memory button on your telephone.
2. The display shows the ID and name of the agent requesting help.
   Press YES to accept the help request
   or
   press INFO to see more information about the request
   or
   press NO to deny the request. This escalates the request, and the display shows the next help request, if there is one.
3. When the help session is complete, press ☎ to end the session.

For a missed request, the prompt "aa asked help" appears".

After a missed request is viewed by a supervisor, it is not shown to any other supervisor.

Chapter 15
Activity Codes

Agents use Activity Codes to allocate the time they spend on calls to one or more activities. Call Center stores the amount of time allocated to an Activity Code and the number of times an Activity Code is entered. You can generate reports that show the length of time the caller and agent discussed the topic designated to the corresponding Activity Code.

Activity Codes are available for Business Communications Manager Basic and Professional, and CallPilot 150. To use Activity Codes, you must have Call Center Reporting installed.

What Activity Codes are

An Activity Code has a digit numeric value between 1 to 16 digits, a name of up to 16 characters that is displayed on agent telephones, and a detailed description of up to 50 characters. You enter a list of Activity Codes in the Activity Code table using CallPilot Manager.

Activity Codes can used for Call Center calls only. If an agent receives a non-Call Center call or initiates an outgoing call, Activity Codes do not apply.

Optional and Prompted Activity Code logging

Agents use the Activity Code Feature Code, [✆] [9] [0] [7], to designate an activity for a call. Agents can use [✆] [9] [0] [7] on one and two-line sets. You can configure the agent's settings so that a [✆] [9] [0] [7] session automatically appears on the agent's telephone at the end of the call (Prompted). If the setting is Optional, the [✆] [9] [0] [7] session does not appear.

Optional is the default setting.

Call Center expects the agent to enter Activity Codes for the call at some point during the "active peg period". The active peg period is a period of time that begins when the call is connected to the agent and ends when:

- The agent's Break Time ends, either by timing out or the agent cancelling it with F908
- The agent logs out of all skillsets with F904
- The agent takes another call
- The agent makes a held call active. If the agent has multiple calls, at the end of the active call they can enter Activity Codes for the call at any time up until they take a held call off hold.

Note: Any time that a call spends on hold is included in the Activity Code time.

If the agent's Break Time is zero, the active peg period ends when the call disconnects.

Agents have the option of pressing [✆] [9] [0] [7] to enter an Activity Code from the time the call starts until the end of the active peg period. Agents have the option of pressing [✆] [9] [0] [7] and entering an Activity Code from the time the call starts until the end of the active peg period.

Agents can enter [✆] [9] [0] [7] any number of times during the active peg period to record activities for the same call. Agents can enter a maximum of 5 Activity Codes per [✆] [9] [0] [7] session. The talk time is associated with all the activities entered. Agents have one final [✆] [9] [0] [7] session after the call ends.

Each time an agent enters an Activity Code, Call Center increases by one the number for that activity. For example, if the agent presses [✆] [9] [0] [7] three times during a call and enters Activity Code 1 the first time, Activity Code 2 the second time, and Activity 1 the third time, the the count for Activity Code 1 is 2.

Prompted

A [✆] [9] [0] [7] session appears on a Prompted agent's telephone when a call ends. The session is active until:

- the agent enters an Activity Code

  or, if the agent does not enter an Activity Code, until:

- the agent releases the session by pressing the Release or the Feature button
- the active peg period ends

If Call Center detects that a call ended and the agent did not enter Activity Codes, Call Center starts a Prompted Activity Code session on the agent's telephone. If the agent does not enter an Activity Code at this point, for example if the agent releases the session, Call Center records the No Peg Activity Code. This is a System Activity Code that is explained in "System Activity Codes" on page 197.

Note: If an agent logs out of all skillsets, Call Center does not start a Prompted Activity Code session. If the active peg period ends with the agent logging out, Call Center does not start a [✆] [9] [0] [7] session. Call Center records the No Peg Activity Code instead.

Optional

The only difference between Optional and Prompted is that if Activity Codes are Optional, a [✆] [9] [0] [7] session does not automatically start on an agent's telephone when they end a call.

Examples of Activity Code calls

During an active call, each time an agent enters an Activity Code, the time up to that point is recorded with the Activity Code entered. The start time is either when the agent answers the call or, if the agent has already entered an Activity Code, when the agent enters the last Activity Code. The time period for the final Activity Code entry (after the call ends) covers the time up to when the call ends.

Example 1: The agent enters Activity Codes during the call

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:08	Agent enters Activity Code 2	3 minutes
9:10	End of call	
9:12	Agent enters Activity Code 3	2 minutes

If the agent enters multiple Activity Codes during one [*] [9] [0] [7] session, Call Center allocates the talk time to all the Activity Codes that the agent enters. For example, if an agent presses [*] [9] [0] [7] once, after the call ends, the total time of the call is allocated to all the Activity Codes the agent enters. The count is increased for each Activity Code the agent enters.

Example 2: The agent enters Activity Codes after the call

Time	Activity	Peg time
9:00	Start of call	
9:10	End of call	
9:11	Agent enters Activity Codes 1,2,3	10 minutes

Activity Codes Call Center automatically enters: Autopegs and System Activity Codes

Call Center has two types of Activity Codes it can automatically enter:

- Autopegs. See "Autopegs" on page 196.
- System Activity Codes. See "System Activity Codes" on page 197.

Autopegs

Whether an agent is Prompted or Optional, if the agent enters an Activity Code while a call is connected and does not enter another Activity Code by the end of the active peg period, there is a period of talk time that is does not have an Activity Code assigned to it. If this happens, Call Center assigns the last Activity Code the agent entered to the remaining time. This is called an Autopeg. An Autopeg does not affect the peg count.

Examples of Autopeg calls

Autopeg example 1

An agent enters Activity Code 1 during the call. Call Center assigns the same Activity Code, Activity Code 1, for the remaining talk time:

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:12	End of call	
	End of active peg period. Call Center autopegs Activity Code 1	7 minutes

Autopeg example 2

The agent enters two Activity Codes and does not enter another Activity Code during the active peg period, so Call Center counts Activity Code 2 for an additional 5 minutes. The count for each Activity Code remains at 1.

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:07	Agent enters Activity Code 2	2 minutes
9:12	End of call	
	End of active peg period. Call Center autopegs Activity Code 2.	5 minutes

Autopeg example 3

During the call, the agent enters three Activity Codes. The agent does not enter another Activity Code during the active peg period. Call Center counts Activity Code 1, 2, and 3 for an additional 12 minutes. The count is 1 for each Activity Code.

Time	Activity	Peg time
9:00	Start of call	
9:06	Agent enters Activity Codes 1,2,3	6 minutes
9:18	End of call.	
	End of active peg period. Call Center autopegs Activity Codes 1,2,3.	12 minutes

System Activity Codes

System Activity Codes track statistics that cannot be tracked directly by agents. Agents cannot enter System Activity Codes. They are automatically recorded by Call Center when it detects certain activities.

System Activity Codes appear in the Activity Codes table, but you cannot modify or delete them. Importing Activity Codes does not affect your System Activity Codes. They are not part of the maximum 2,000 entries in the table.

System Activity Codes use reserved values in the range 9999999999999901 to 9999999999999999, and appear in Activity Code reports.

System Activity Codes that Call Center records

No Peg when No Activity Code is entered	If the agent does not enter an Activity Code by the end of the active peg period, Call Center records the No Peg System Activity Code. If an agent enters an Activity Code as their Break Time is ending, it is possible that Call Center will not record the Activity Code, and will record the No Peg System Activity Code instead. The No Peg System Activity Code is 9999999999999999.
Held Call Abandoned for calls on hold that are abandoned	If an agent puts a call on hold and the held caller hangs up, Call Center records the Held Call Abandoned Activity Code using the time the caller was on hold. The Held Call Abandoned Activity Code is 9999999999999998.
Non-Agent for non-agent talk time	If a call is transferred to a non-agent, Call Center enters the Non-Agent Activity Code for the time spent with the non-agent. The Non-Agent Activity Code is 9999999999999997.

Examples of System Activity Code calls

Example 1: No Peg

A call where the agent does not enter an Activity Code.

Time	Activity	Peg time
9:00	Start of call	
9:10	End of call	
	If Activity Codes are Prompted and the agent does not enter an Activity Code, Call Center starts a F907 session. If the Break Time is 0, Call Center does not start a F907 session. Whether Activity Codes are Prompted or Optional, if the agent does not enter an Activity Code, Call Center records the No Peg System Activity Code for 10 minutes.	

Example 2: Held Call Abandoned and No Peg

A Prompted call where an on-hold caller hangs up.

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent puts call 1 on hold	
9:05	Start of call 2	
9:07	Call 1 on hold hangs up. Call Center records the Held Call Abandoned System Activity Code for 2 minutes and the No Peg System Activity Code for 5 minutes.	2 minutes 5 minutes

Example 3: No Peg and Non Agent

A Prompted call transferred to non-agent, where the agent does not enter an Activity Code.

Time	Activity	Peg time
9:00	Start of call	
9:06	Agent transfers the call to a non-agent and does not enter an Activity code. As soon as the agent transfers the call, a F907 session starts on the agent's telephone.	
9:10	End of call. Call Center records 6 minutes for the Non Agent Talk Time System Activity Code.	6 minutes
	End of active peg period. Because the agent has not entered an Activity Code, Call Center records 4 minutes for the No Peg System Activity Code.	4 minutes

Example 4: Non Agent

A Prompted or Optional call that is transferred to a non-agent.

Time	Activity	Peg time
9:00	Start of call 1	
9:10	Agent 1 transfers the call to a non-agent subject matter expert. If Activity Codes are Prompted, as soon as the agent transfers the call a F907 session starts on the agent's telephone. If agent does not enter an Activity Code, Call Center records the No Peg System Activity Code for 10 minutes. If Activity Codes are Optional, the agent can enter an Activity Code at any time until the end of the Active Peg period.	
9:15	Non-agent transfers the call to agent 2. Call Center records the Non Agent System Activity Code.	5 minutes
9:18	Agent 2 enters Activity Code 1	3 minutes
9:20	Agent 2 transfers the call to a non-agent. Call Center Autopegs an additional 2 minutes for Activity Code 1 if agent 2 doesn't enter another Activity Code before the end of the Active Peg period.	
9:25	End of call. When the call ends, Call Center records the Non Agent System Activity Code for 5 minutes.	

Prompted and Optional Activity Code logging

You apply the Prompted or Optional setting to skillsets and agents using CallPilot Manager. If you set a skillset to Prompted, all of the calls to the skillset must have Activity Codes entered for them. If you set an agent to Prompted, the agent must enter an Activity Code for every call they answer. If either the skillset or the agent setting is Prompted, entering Activity Codes for calls is prompted. If both skillset and agent are optional, entering Activity Codes is optional.

The call's skillset is its current skillset. The call's current skillset is not necessarily the original skillset because a call can move to a new skillset through a transfer or intelligent routing rule.

The default setting for skillsets and agents is Optional.

Examples of Prompted and Optional Calls

Example 1: Optional where the agent does not enter an Activity Code

Time	Activity	Peg time
9:00	Start of call	
9:11	End of call	
	Since entering Activity Code is Optional, there is no Prompted F907 session. Because the agent did not enter an Activity Code, Call Center records the No Peg System Activity Code for 10 minutes.	10 minutes

Example 2: Prompted where the agent does not enter an Activity Code

Time	Activity	Peg time
9:00	Start of call	
9:10	End of call	
	A prompted F907 session appears on the agent telephone at the end of the call. Because the agent does not enter an Activity Code, Call Center records the No Peg System Activity Code for 10 minutes.	10 minutes

Example 3: Prompted or Optional where the agent enters an Activity Code during a call

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:11	End of call.	
	End of the active peg period. Call Center autopegs Activity Code 1 for 6 minutes.	6 minutes

Example 4: Prompted or Optional where the agent enters several Activity Codes during a call

Time	Activity	Peg time
9:00	Start of call	
9:05	Agent enters Activity Code 1	5 minutes
9:08	Agent enters Activity Code 2	3 minutes
9:11	End of call.	
	End of active peg period. Call Center applies the last Activity Code entered, and autopegs Activity Code 2 for the remainder of the call.	3 minutes

Example 5: The first agent is Prompted and the second agent is Optional

Time	Activity	Peg time
9:00	Start of call	
9:03	Agent 1 enters Activity Code 1	3 minutes
9:05	Agent 1 transfers the call to Agent 2. Agent 1 has until the end of the Active Peg period to enter another Activity Code. Because agent 1 did not, Call Center Autopegs the remaining 2 minutes of talk time.	
9:10	End of call.	
	End of the active peg period. Because agent 2 did not enter an Activity Code, Call Center records the No Peg System Activity Code for 5 minutes.	5 minutes

How Activity Codes interact with system features

Transfer to Agent

If a call is transferred to another agent, the second agent can continue to enter Activity Codes for the call. Here are three examples, all with Prompted Activity Codes.

Example 1: Both agents enter Activity Codes

Time	Activity	Peg time
9:00	Start of call 1	
9:05	Agent 1 enters Activity Code 1	5 minutes
9:07	Agent 1 transfers call to agent 2. If the agent does not enter another Activity Code, Call Center Autopegs 2 minutes for Activity Code 1. If agent 1 does not enter another activity code, Call Center autopegs 2 minutes for Activity Code 1.	
9:10	Agent 2 enters Activity Code 2	3 minutes
9:15	End of call. If agent 2 does not enter an Activity Code by the end of the Active Peg period, Call Center Autopegs an additional 5 minutes for Activity Code 2.	

Example 2: The first agent enters an Activity Code

Time	Activity	Peg time
9:00	Start of call 1	
9:05	Agent 1 enters Activity Code 1	5 minutes
9:07	Agent 1 transfers the call to agent 2. If the agent does not enter another Activity Code, Call Center Autopegs 2 minutes for Activity Code 1.	
	Agent 2 does not enter an Activity Code.	
9:15	End of call. A F907 session appears on Agent 2's telephone.	
	End of active peg period. Because agent 2 has not entered an Activity Code, Call Center records the No Peg System Activity Code for 8 minutes.	8 minutes

Example 3: The second agent enters an Activity Code

Time	Activity.	Peg time
9:00	Start of call 1	
9:07	Agent 1 transfers the call to agent 2. As soon as Agent 1 transfers the call, a prompted F907 session starts on their telephone. If agent 1 does not enter an Activity Code before the end of the Active Peg period, Call Center records the No Peg System Activity Code for 7 minutes.	
9:10	Agent 2 enters Activity Code 2	3 minutes
9:15	End of call. If agent 2 does not enter another Activity Code by the end of the Active Peg period, Call Center Autopegs 5 minutes for Activity Code 2.	

Note: For an example of transfer to a non-agent, see "Example 4: Non Agent" on page 199.

Break Time

Break Time is a skillset property that gives agents an interval to complete tasks related to the previous call. When Break Time starts, if a call is Prompted and the agent did enter an Activity Code during the call, an [⎋] [9] [0] [7] session starts on the agent's telephone. The session remains for two minutes unless the agent ends the session by entering an Activity Code, releasing the session, or taking another call.

At the end of Break Time:

- if a call is Optional and the agent did not enter an Activity Code, Call Center system records the No Peg System Activity Code.
- If a call is Prompted and the agent did not enter an Activity Code, the [⎋] [9] [0] [7] session exits and Call Center records the No Peg System Activity Code.

If an agent enters an Activity Code, whether Prompted or Optional, that does not cover the entire talk time of the call, Call Center autopegs the last Activity Code the agent entered for the remainder of the talk time.

If an agent enters an Activity Code as their Break Time is ending, it is possible that Call Center will not record the Activity Code, and will record the No Peg System Activity Code instead.

Note: If the Break Time is 0, a F907 session never automatically starts on an agent's telephone, even if the agent is Prompted for Activity Codes. Make sure the Break Time is longer than 10 seconds to allow time for Activity Code entry.

For more information about Break Time properties for a skillset, refer to "Break Time" on page 45.

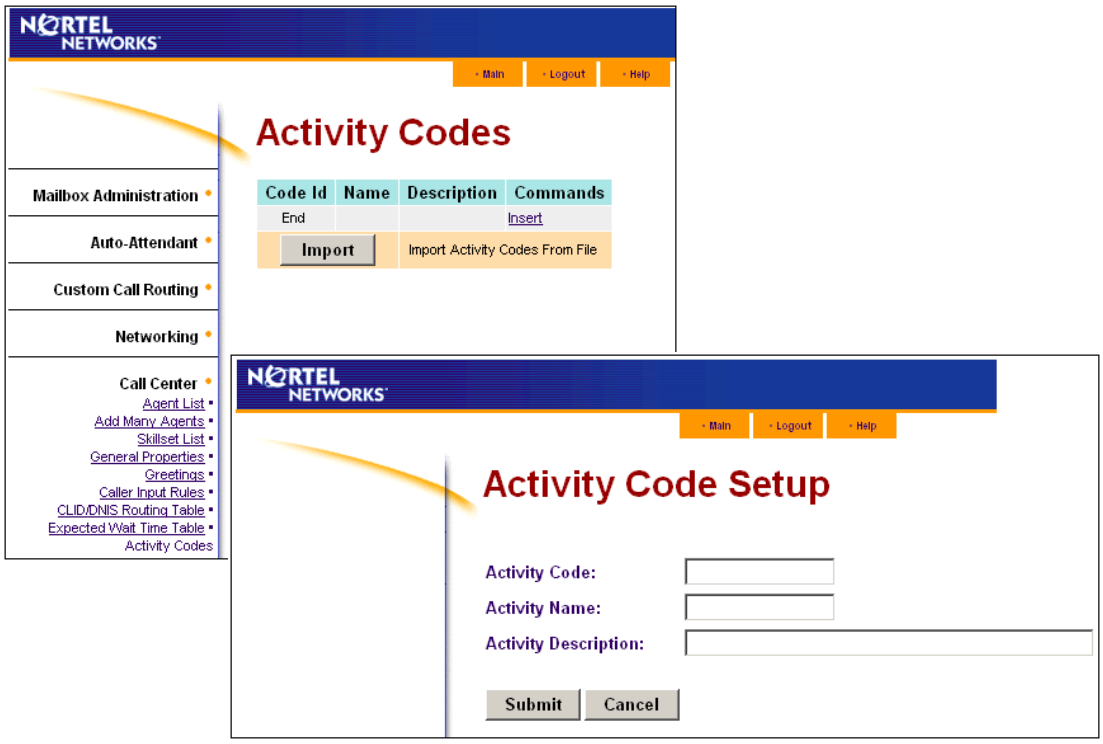
Creating Activity Codes

You create Activity Codes using CallPilot Manager. The Activity Codes table can have a maximum of 2,000 entries.

To create an Activity Code

1 Click the **Call Center** heading and click the **Activity Codes** link.
The Activity Codes page appears.

2 Click the **Insert** link.
The Activity Code Setup page appears.



3 In the **Activity Code** box type the number of the activity code, for example, 1.
The number can be a maximum of 16 digits long.

4 In the **Activity Name** box type the name for the activity code, for example, Cgy Sales 1.
The name can be a maximum of 16 alphanumeric characters long.

5 In the **Activity Description** box type a description for the Activity Code, for example, Calgary sales dept 1st tier. The description can be a maximum of 50 alphanumeric characters long.

6 Click the **Submit** button.
The new Activity Code appears in the Activity Codes table.

Changing an Activity Code

You can change an Activity Code's name and description. You cannot change an Activity Code's number.

1. Click the **Call Center** heading and click the **Activity Codes** link.
   The Activity Codes page appears.
2. Click the **Change** link for the Activity Code you want to change.
   The Activity Code Setup page appears.
3. Make the changes you want to the Activity Code's name and description.
4. Click the **Submit** button.

Deleting an Activity Code

1. Click the **Call Center** heading and click the **Activity Codes** link.
   The Activity Codes page appears.
2. Click the **Delete** link for the Activity Code you want to delete.
   The Activity Code is deleted from the Activity Codes table.

Importing Activity Codes

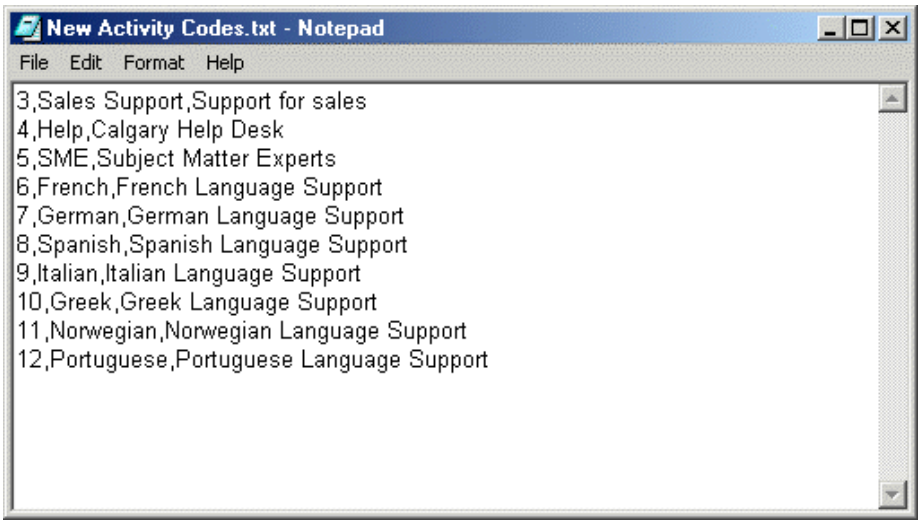
If you use Business Communications Manager, you can import files of Activity Codes. You can update the Activity Code table with a spreadsheet or other file. You specify whether the file replaces the Activity Code list, or is added to it.

Creating a list of Activity Codes

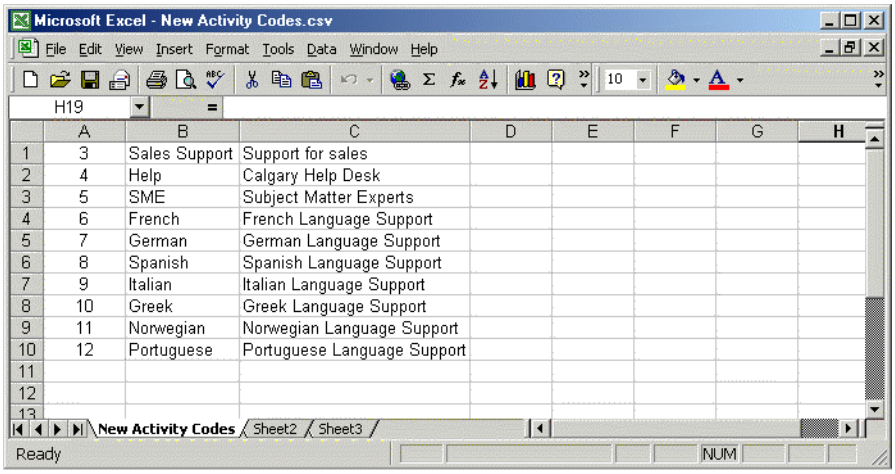
The file you create to import must:

- be in ASCII format. If you create the list in Notepad, save it in ANSI format. If you create the list in Excel, save it in .csv format.
- have one Activity Code per line, comprised of the ID, name, and description, separated by commas.

Example of an Activity Code list created in Notepad



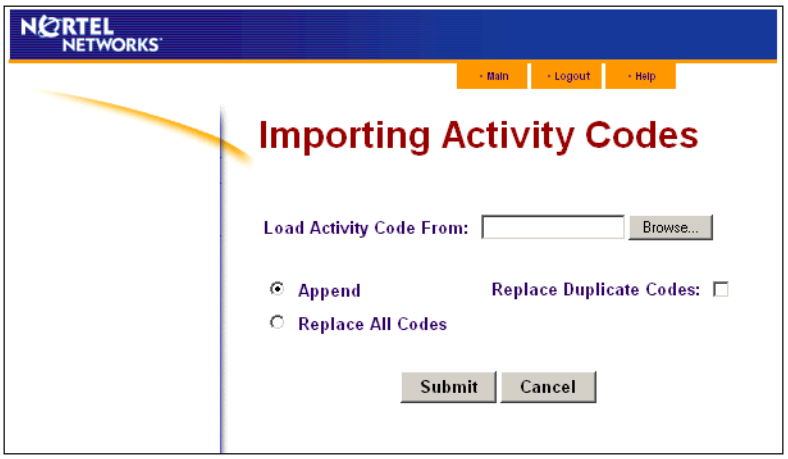
Example of an Activity Code List created in Excel


Microsoft Excel - New Activity Codes.csv
File Edit View Insert Format Tools Data Window Help
H19
A B C D E F G H
1 3 Sales Support Support for sales
2 4 Help Calgary Help Desk
3 5 SME Subject Matter Experts
4 6 French French Language Support
5 7 German German Language Support
6 8 Spanish Spanish Language Support
7 9 Italian Italian Language Support
8 10 Greek Greek Language Support
9 11 Norwegian Norwegian Language Support
10 12 Portuguese Portuguese Language Support
11
12
13
New Activity Codes Sheet2 Sheet3
Ready
NUM

To import a list of Activity Codes

1 Click the **Call Center** heading and click the **Activity Codes** link.
The Activity Codes page appears.

2 Click the **Import** button.
The Importing Activity Codes dialog box appears.



3 In the **Load Activity Code From** box, enter the path of the file you want to import
or
click the **Browse** button and locate the file.

4 Choose the **Append** option if you want to add the list of Activity Codes to your existing Activity Codes, and select the **Replace Duplicate Codes** check box if you want to replace any duplicates in the Activity Code table with the new values in your list,
or
choose the **Replace All Codes** option if you want to replace your table of Activity Codes with the new list.

5 Click the **Submit** button.
If you chose to replace all codes, a message appears that asks you to confirm that you want to replace all the Activity Codes in the table. Click the **Yes** button.

Communicating Activity Codes to supervisors and agents

You can print the Activity Code table screen and distribute it to supervisors and agents in your Call Center. Then they will know which Activity Codes your Call Center uses, and how to enter them.

When you make any changes to your Activity Codes, be sure to communicate the changes to the agents and supervisors.

Assigning Activity Code settings to agents and skillsets

By default agents and skillsets have Optional prompting for Activity Codes.

To set up or change Activity Code settings for an agent see

- "Adding an agent or a supervisor" on page 35
- "Adding more than one agent" on page 37
- "Changing agent information" on page 39

To set up or change Activity Codes for a skillset see

- "Setting up or changing a skillset" on page 46

Generating Activity Code reports

You can generate Activity Code reports that are sorted according to Activity Code, skillset and agent. For information on generating these reports see the *Nortel Networks Call Center Reporting Set Up and Operation Guide*.

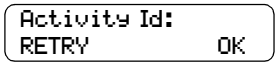
You can view a list of your Activity Codes by ID, name and description in the System Configuration report. For more information see "To generate the System Configuration Report" on page 177.

How agents enter Activity Codes

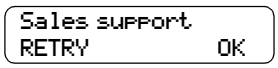
[e] [9] [0] [7] is the Feature Code for Activity Codes. We recommend that agents program [e] [9] [0] [7] to a memory button on their telephone. For how to program a Feature Code to a memory button see "Programming a memory button with a Feature Code" on page 30.

1 During or after a call but before the end of the active peg period, the agent presses [e] [9] [0] [7].

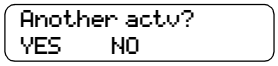
If an agent is Prompted and has not entered an Activity Code by the end of the call, an [e] [9] [0] [7] session starts automatically.



2 The agent enters the Activity Code number and presses OK.



3 The Activity Code name is displayed, in this example *Sales support*. The agent presses OK to confirm this is the correct Activity Code.



4 The agent can press YES to enter another Activity Code or press NO to end the [e] [9] [0] [7] session.

Pressing NO or releasing the session on this display submits Activity Codes.

Chapter 16
Tips for operating Call Center

This chapter provides tips to improve the operation of Call Center.

Agent administration

- Agents can log on to any telephone on the system.
- Call Center has an Auto Busy Mode feature that ensures that calls do not ring indefinitely at an abandoned agent set. If an agent does not answer a call within a specified number of rings, the call returns to the skillset to be presented to another agent, and the telephone is placed into Auto Busy Mode by Call Center. The agent must manually cancel Auto Busy Mode to resume accepting calls.

Skillset administration

- If a call comes in on a line that belongs to a skillset with no available agents, the call is not answered until either the Delay Answer Time elapses or an agent becomes available for the call.

  During the Delay Answer period when the caller hears ringback, the line the call comes in on still rings on the sets configured to answer this line.

Call Center greetings

- Record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, waiting callers must wait longer before they hear a greeting because voice ports are used each time a greeting is played to a caller. The longest recorded greeting for a skillset affects the frequency with which callers hear greetings. If your greeting length times vary a lot, there is a very large variance in how often callers hear greetings. Therefore it is best to keep greetings similar lengths if possible.
- Ensure that when you record greetings that you use to transfer callers to a skillset mailbox you include in the greeting: "*To leave a message in the mailbox press nine*" (or the keypad button you designate for the skillset mailbox).

Routing Table administration

- Use Forced Play greetings sparingly. If you use Forced greetings, keep them as short as possible. Many long Forced Play greetings slows transferring calls to agents and causes unpredictable increases in distribution times. Calls in other skillsets are not affected.
- When a Forced Play greeting plays for the highest priority call in a skillset, the other lower priority calls in the skillset have to wait even if agents become available during this time. For example, the longest waiting call, which is the highest priority call, gets routed to a Forced Play greeting. Agents become available during the time that the highest priority call is played a Forced Play greeting. The result is that no calls in this skillset are routed to an agent until the Forced Play greeting is finished playing to the highest priority call. This guarantees that the highest priority call is answered before lower priority calls in the skillset.
- Ensure that an Intelligent Caller Input Routing, Basic transfers calls to a skillset mailbox if you want callers to be able to press 9 to leave a message in a skillset mailbox. Remember to explain in your greeting that the you can press 9 to leave a message in a mailbox.
- Program Intelligent Caller Input Routing, Basic to transfer calls to a skillset mailbox for Non-business hours greetings so that you do not miss any messages.
- If a Goto step follows a greeting, make a Distribution step the target for the Goto step. If you make the Goto target step after a Greeting step another Greeting step, callers hear two greetings in a row.

Routing calls using Dynamic Call Priority

If you use priority to route calls to agents, make sure you have both Agent Priority and Call Priority configured. Each call that enters a skillset is given a default call priority of 10. In Professional Call Center, you can change a call's priority using:

- Intelligent Caller Input Routing, Advanced Option
- Intelligent CLID/DNIS Routing
- Intelligent Overflow Routing

Call priority is distinct from agent priority. If a waiting call needs to be routed, for example when an agent becomes available, Call Center determines which waiting call must be handled next. This is the call with the highest priority, or, if all the waiting calls have the same priority, the call with the longest wait time. Call Center then determines the right agent to handle the call. If the skillset's method of call distribution is Preferred, Call Center finds the available agents assigned to and logged in to the skillset, and chooses the one with the highest priority. If the method is Least Busy, the agent that has been available longest is routed the call.

Call Center general parameters

- Do not assign all the available voice channels as reserved channels. Call Center can use any voice channel, but reserved channels are never used by voicemail.
- A reserved or voice channel is used when:
  - a Call Center greeting is played to a caller
  - Off-premise Message Notification notifies you of a message in a skillset mailbox

How to calculate the longest time a caller can be on hold

The formula used to calculate the longest wait time a caller can be on hold without hearing a greeting is:

$$\text{Wait Time} = \left[\left(\frac{\text{maximum calls}}{\text{voice channels}}\right) - 1\right] \text{ x maximum greeting length}$$

where:

- **wait time** is the longest time in seconds that a caller can be on hold without hearing a greeting
- **maximum calls** is the maximum number of calls that Call Center can normally handle
  - In a call center where external calls are **not** transferred or forwarded to Call Center, the maximum number of calls is the same as the number of lines programmed to be answered by Call Center
  - In a call center where external calls **are** frequently transferred or forwarded to Call Center, the maximum number of calls is the total number of lines on the system.
    For information on how calls transfer to a skillset, refer to "How incoming calls are sent to a skillset" on page 43.
- **voice channels** is the estimated number of voice channels available to Call Center
  - The minimum number of voice channels available is equal to the number of reserved channels you set up in General call center parameters. Additional channels that are not used by CallPilot can also be used. For example, even though you assign two reserved channels when you set up the General Call Center parameters, Call Center can use additional voice channels if and when they are available.
- **maximum greeting length** is the duration of the longest greeting of a skillset in seconds

Tips to improve the efficiency of Call Center

Plan for busy times:

- when you assign agents to the skillsets, assign as many qualified agents as possible to answer calls for the skillsets
- have agents log on to a skillset when it gets busy
- have routing that moves the call to another skillset with a higher priority

Plan for slow times:

- for example, if agents are logged on to skillset 1 only, ensure that incoming calls to skillset 2 overflow to skillset 1. When you set up skillset parameters for skillset 2, assign a time to the Overflow parameter. Then callers can still speak to an agent.
- When no agents are logged on to any skillset, ensure that the call center greetings set up in the Routing Table have Transfers set up. If a call center greeting transfers to a skillset mailbox, callers can press 9 to leave a message in the skillset mailbox. Ensure that the greeting includes that callers can press 9 to leave a message in a mailbox. 9 is the default keypad button callers can press to transfer to the skillset mailbox. You can select a different number.

Using B1 and B2 DNs

You can use B2 DNs on Business Communications Manager systems only if you have upgraded your system. If you have a new Business Communications Manager system, you cannot use B2 DNs.

For more about assigning B1 and B2 CDNs to skillsets see "Skillset properties" on page 44.

When you assign a CDN to a skillset

- If you use Business Communications Manager, do not program any new skillsets to use DNs that reside on ports 01xx or 08xx (or 07xx) if you use a 5/3 split system). Neither Call Center nor other system components (including the core) are guaranteed to be robust with this configuration. This does not apply to you if you use a CallPilot 100/150 system.
- It can be a B1 extension number that is not connected to any telephone or peripheral.
- It can be a B2 extension that is not connected to a B2 application.
- If a telephone or any other device uses the same extension the call center will not answer calls.
- On a Business Communications Manager system, you can determine the range of B1 extensions by using the Unified Manager. The DNs do not have to be physically equipped with a Media Bay Module.
- The system assigns a skillset mailbox that uses the CDN as its mailbox number. You must initialize the mailbox before you can use the skillset or the mailbox.
- Do not rename a telephone DN to a CDN used by Call Center.

- Do not assign IP telephones to the DN used by Call Center. The user does not receive an error message if this happens, even though IP telephones usually warn a user if there are conflicting telephone DNs. Therefore, ask your System Administrator for a list of the CDNs that are used by Call Center.
- Do not use any CDNs that are used by Interactive Voice Response as Call Center CDNs.

You can use B2 CDNs if

- you use a CallPilot 150 platform. CallPilot 150 has a B2 DN for every B1.
- you use a Business Communications Manager system that has legacy B2 CDNs.

Your Call Center has legacy B2 CDNs if:

- you have upgraded your system

  and

- your Business Communications Manager system is in Partial Double Density mode (this is the default mode) and the B2s on buses 6 and 7 were configured as CDNs before the upgrade.

About Partial Double Density mode:

A B2 extension is a spare extension that exists on buses 6 and 7 only if you have Partial Double Density mode enabled. All other buses have only B1 extensions, no matter what mode the Business Communications Manager is in.

Partial Double Density mode is the default setting for Business Communications Manager.

Partial Double Density mode allows compatibility with Companion base stations.

You can manually change CDNs from B1s to B2s by entering a B2 CDN in the skillset properties. If the Business Communications Manager is changed to Full Double Density mode, the system will change the B2 CDNs to B1s.

About using B1 and B2 extensions

- We recommend that you use B1 CDNs over B2 CDNs. B1 CDNs have better functionality than B2 CDNs.
- A B1 extension number is the extension number that you dial to call a telephone or peripheral. A B2 extension is a spare extension.
- All other buses have only B1 extensions. They do not have B2 extensions no matter what mode the Business Communications Manager is in.
- Both B1 and B2 extensions can answer external calls.
- Both B1 and B2 extensions can have external calls transferred to them by a third person.
- B1 extensions allow a set to be CFB or CFNA to them. B2 extensions do not support CFB or CFNA. Therefore a skillset that uses a B2 CDN cannot have calls forwarded to it from telephone programming.

- B2 CDNs cannot be used as a prime set for target lines.

  For information about determining available B1 and B2 extensions on buses 6 and 7 when you use Partial Double Density mode, refer to the *Business Communications Manager Programming Operations Guide.*

Chapter 17
Examples of Call Center configurations

There are many ways to set up Call Center in your company. Here are three examples of how one business configured Call Center to meet its changing needs:

- "Basic Call Center" on page 217
- "Professional Call Center with Reporting" on page 223
- "Multimedia Call Center" on page 236

Basic Call Center

Mosaic Hardwood Flooring is a business that receives many calls each day. Most of the calls are for sales or installation and service. Calls are answered by whomever is available, and often callers must wait on hold while the employee answers another call. Calls are transferred to other telephones where, if they are not answered, they can return to the original answer point. The employee then puts the current call on hold and asks the first caller who they are waiting for. Because Mosaic does not have a strategy for how calls are answered, they have had many complaints from customers and employees, and lost business.

Mosaic decides to implement a Call Center solution to distribute calls to the appropriate staff members. Mosaic wants a Call Center that directs calls according to whether they are for sales, or for installation and service.

Mosaic has 14 employees, including four full-time staff members in the showroom, one employee who books installations and takes service requests, and a team of nine installers. Although all of the employees are able to answer sales and service calls, Mosaic prefers that only the showroom staff receive sales calls, and answer service calls only if a caller has been waiting for more than 15 minutes. Although there is an employee who handles service and installation calls, Mosaic wants the installers to be able to answer service questions when they are in the office.

Mosaic has four PSTN lines. Telephones are distributed throughout their offices and showroom.

Here is how Mosaic configured their Basic Call Center:

"General Configuration" on page 218

"Skillset 1 properties" on page 218

- "Routing Tables" on page 219
- "Service Mode" on page 220
- "Overflow" on page 220

"Skillset 2 properties" on page 221

- "Routing Tables" on page 221
- "Service Mode" on page 222
- "Overflow" on page 222

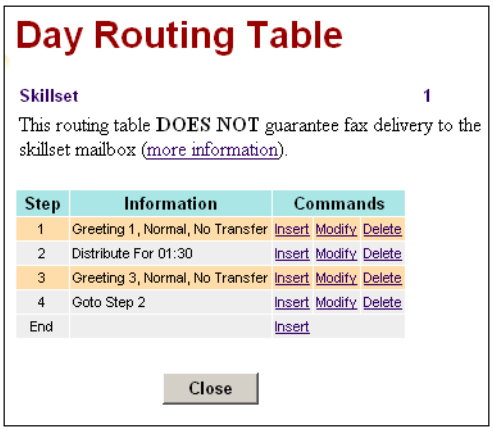
General Configuration

Keycode	Basic Call Center
Hardware	Business Communications Manager
Agents	Agent 1- Bob Agent 2- John Agent 3- Jane Agent 4- Sales4 Agent 5- Inst_Supp1 Agent 6- Installer1 Agent 7- Installer2 Agent 8- Installer3 Agent 9- Installer4 Agent 10- Installer5 Agent 11- Installer6 Agent 12- Installer7 Agent 13- Installer8 Agent 14- Installer9
Greeting 1 & 2	Thank you for calling Mosaic Hardwood Flooring. Please hold for the next available sales representative.
Greeting 3	Thank you for holding. Please continue to hold and your call will be answered in the order it was received.
Lines	121, 122 → Skillset 1 → 2 rings 123, 124 → Skillset 2 → 2 rings

Skillset 1 properties

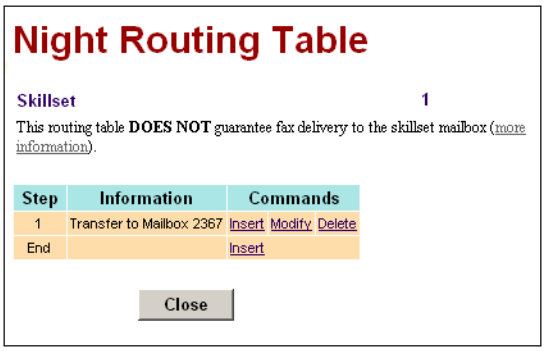
Name	Sales
MWI DN	333
Method	Least busy
Attendant Ext	None
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Selected
Initial Call Duration	00:03:00
Activity Code Entry Type	Optional
Agents	1,2,3,4

Routing Tables


Day Routing Table
Skillset 1
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).
Step Information Commands
1 Greeting 1, Normal, No Transfer Insert Modify Delete
2 Distribute For 01:30 Insert Modify Delete
3 Greeting 3, Normal, No Transfer Insert Modify Delete
4 Goto Step 2 Insert Modify Delete
End Insert
Close

Day Routing Table steps

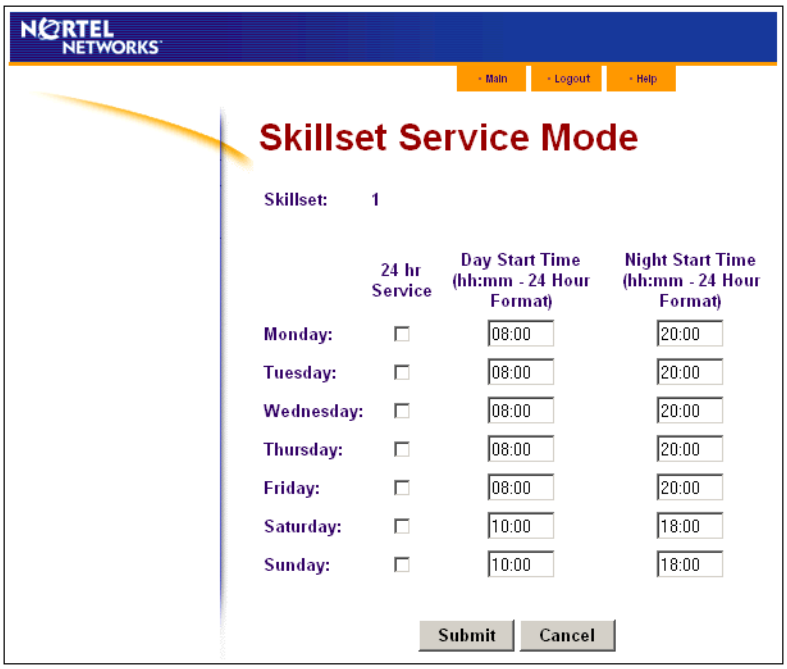
1 - Greeting 1
2 - Distribute 01:30 (mm:ss)
3 - Greeting 3
4 - Go to Step 2


Night Routing Table
Skillset 1
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).
Step Information Commands
1 Transfer to Mailbox 2367 Insert Modify Delete
End Insert
Close

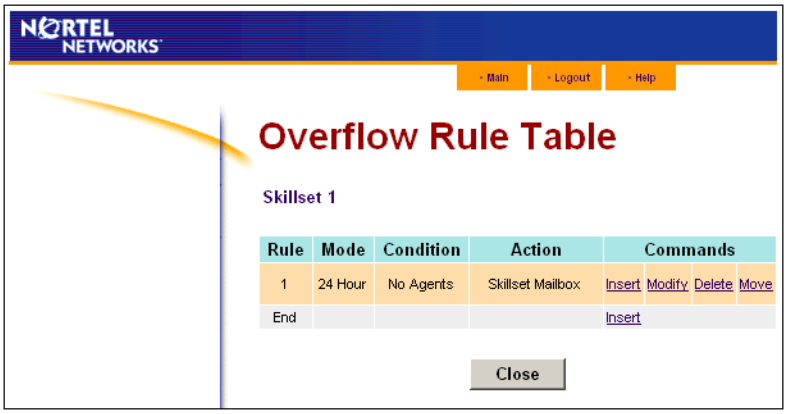
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



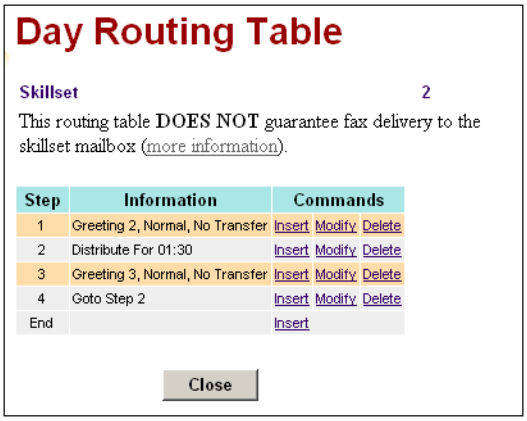
Overflow



Skillset 2 properties

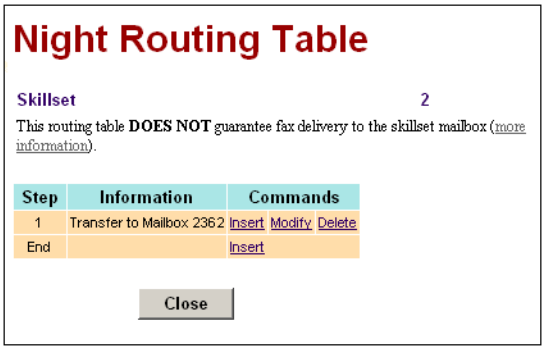
Name	Serv_Inst
MWI DN	334
Method	Least busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:03:00
Activity Code Entry Type	Optional
Agents	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14

Routing Tables


Day Routing Table
Skillset 2
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).
Step Information Commands
1 Greeting 2, Normal, No Transfer Insert Modify Delete
2 Distribute For 01:30 Insert Modify Delete
3 Greeting 3, Normal, No Transfer Insert Modify Delete
4 Goto Step 2 Insert Modify Delete
End Insert
Close

Day Routing Table steps

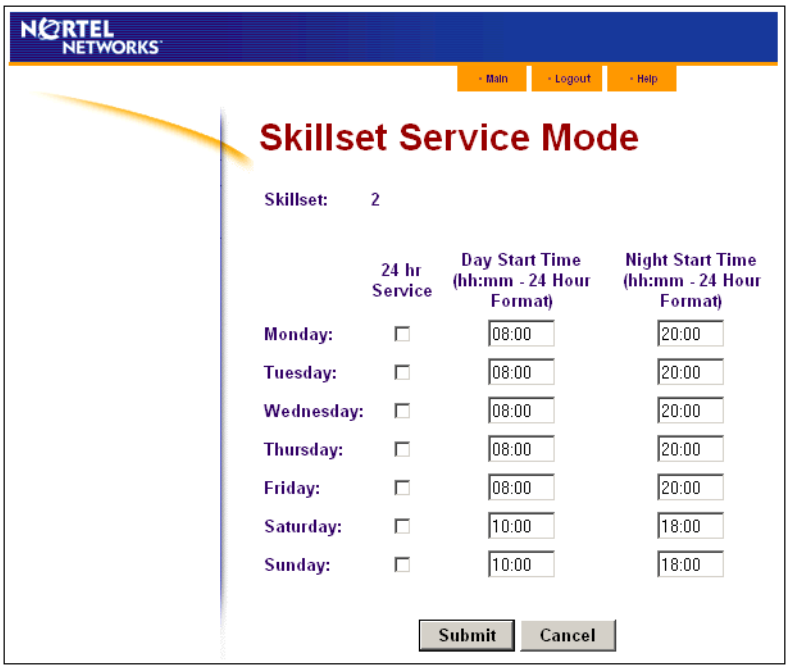
1 - Greeting 2
2 - Distribute 01:30 (mm:ss)
3 - Greeting 3
4 - Go to Step 2


Night Routing Table
Skillset 2
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).
Step Information Commands
1 Transfer to Mailbox 2362 Insert Modify Delete
End Insert
Close

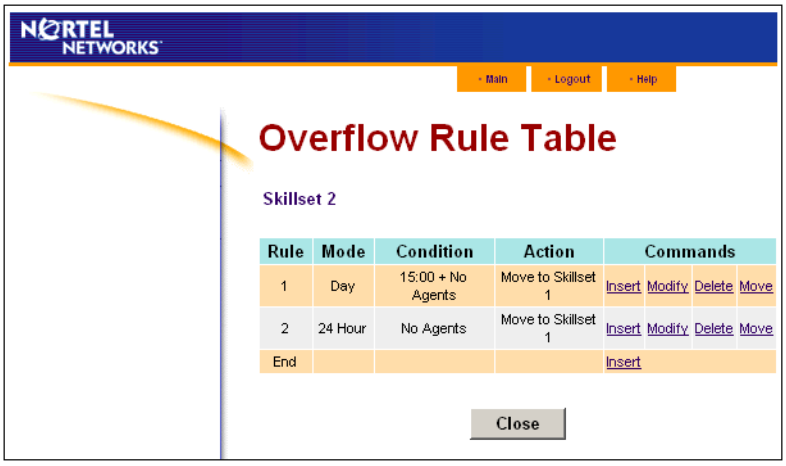
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



Overflow


NORTEL NETWORKS
Main
Logout
Help
Overflow Rule Table
Skillset 2
Rule Mode Condition Action Commands
1 Day 15:00 + No Agents Move to Skillset 1 Insert Modify Delete Move
2 24 Hour No Agents Move to Skillset 1 Insert Modify Delete Move
End Insert
Close

Professional Call Center with Reporting

A year after they installed Basic Call Center, Mosaic Hardwood Flooring moved to a larger location and expanded their team to 33 members. They also now have one PRI trunk, which lets them handle more calls. Mosaic wants to upgrade their Call Center to keep up with their increased call volume. They want to be able to direct calls to sales, customer service, preferred customers, and installation bookings. They want to track how many of each type of call is being received each week, and they want to tell callers on hold what the Expected Wait Time is.

Mosaic now has seven on-site and two off-site sales representatives. There are two staff members who book installations and two staff members who track service requests. The installation team has expanded to 20 members.

Three senior sales people handle the preferred customers calls. Only the sales people take sales-related calls. Installation bookings calls are handled by the installation booking employees. Service requests are handled by two service request employees and any of the installation team when they are in the shop.

Here is how Mosaic configures their Professional Call Center:

"General Configuration" on page 224

"General Properties" on page 225

"Caller Input Rules" on page 225

"Expected Wait Time" on page 226

"Activity Codes" on page 226

"Lines" on page 227

"Skillset 1" on page 227

- "Routing Tables" on page 228
- "Service Mode" on page 229
- "Overflow" on page 229

"Skillset 2" on page 230

- "Routing Tables" on page 230
- "Service Mode" on page 231
- "Overflow" on page 231

"Skillset 3" on page 232

- "Routing Tables" on page 232
- "Service Mode" on page 233
- "Overflow" on page 233

"Skillset 4" on page 234

- "Routing Tables" on page 234
- "Service Mode" on page 235
- "Overflow" on page 235

General Configuration

Additional keycodes	Call Center Professional Upgrade, Reporting for Call Center
Agents	Agent 1- Bob Agent 2- John Agent 3- Jane Agent 4- Sales4 Agent 5- Installation booker 1 Agents 6-14 Installers Agents 15-19 Sales Agent 20- Installation booker 2 Agent 21-22 Supp_book1 Agents 23-33- Installers
Greetings	Welcome to Mosaic Hardwood Flooring Sales department. Please stay on the line for one of our representatives or enter your Customer ID.
Greeting 2	Welcome to Mosaic Hardwood Flooring Support department. Press 1 to book a support request, 2 to check on the status or cancel an existing booking, or stay on the line for general inquiries.
Greeting 3	Welcome to Mosaic Hardwood Flooring Installation department. Press 1 to book an Installation request, 2 to check on the status or cancel an installation booking, or stay on the line for general inquiries.
Greeting 4	Thank you for entering your Customer ID. A representative will be with you shortly.
Greeting 5	All of our representatives are currently busy. Please continue to hold or press 9 to leave a message.
Greeting 6	Thank you for continuing to hold. Please stay on the line, or press 9 to leave a message which will be returned as soon as possible by a representative.
Greeting 7	Thank you for continuing to hold. Please stay on the line or press 9 to leave a message.
Greetings 8 & 9	Advertisement Announcements1 & 2
Greetings 10 & 11	Support Announcements 1 & 2
Greetings 12 & 13	Installation Announcements 1 & 2
Greeting 50	The expected wait time for your call is 3 minutes. Please stay on the line or press 9 to leave a message.
Greeting 51	The expected wait time for your call is 6 minutes. Please stay on the line or press 9 to leave a message.
Greeting 52	The expected wait time for your call is 9 minutes. Please stay on the line or press 9 to leave a message.

Greeting 53	The expected wait time for your call is 12 minutes. Please stay on the line or press 9 to leave a message
Greeting 54	The expected wait time for your call is 15 minutes. Please stay on the line or press 9 to leave a message.
Greeting 55	All of our representatives are currently assisting other clients. Please remain on the line, or press 9 to leave a message.

General Properties

Primary alert	03:00
Secondary alert	10:00
CC Reporting Server Password	1234
Enable CC Reporting Data Stream	Enabled
Reserved channels	2
Supervisor Help request timeout	12
Supervisor Help from	All skillsets
Enable Caller ID	Name with number backup

Caller Input Rules

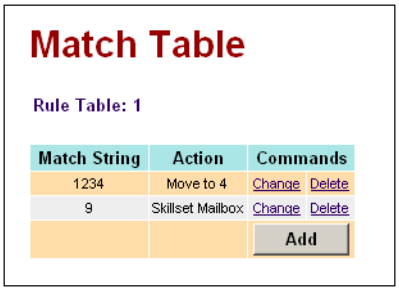


Table 1: Variable length

Match string 1234: move to skillset 4
Match string 9: send to skillset mailbox

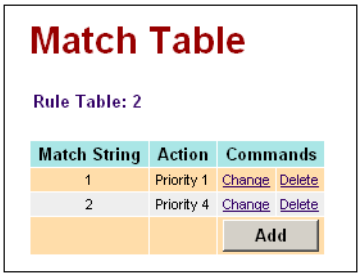
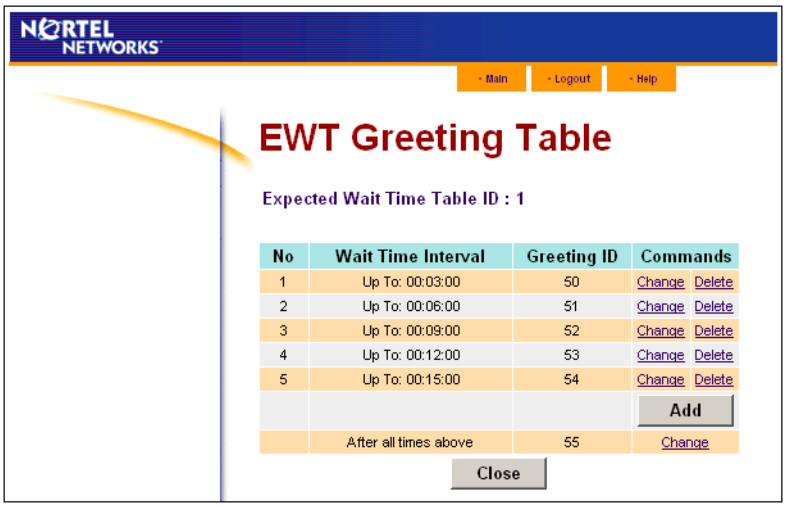


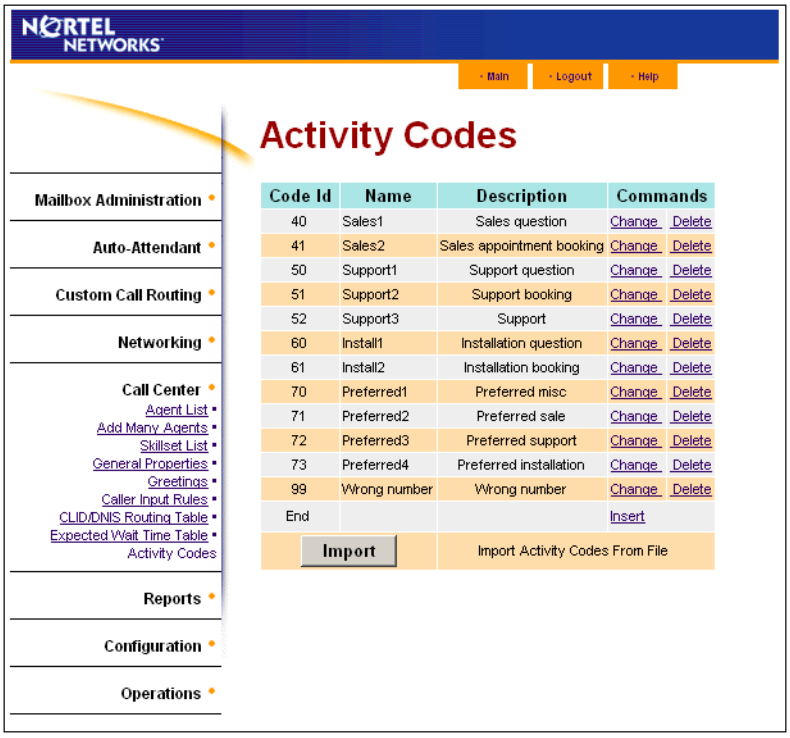
Table 2: Fixed length

Match string 1: change priority to 1
Match string 2: change priority to 4

Expected Wait Time



Activity Codes



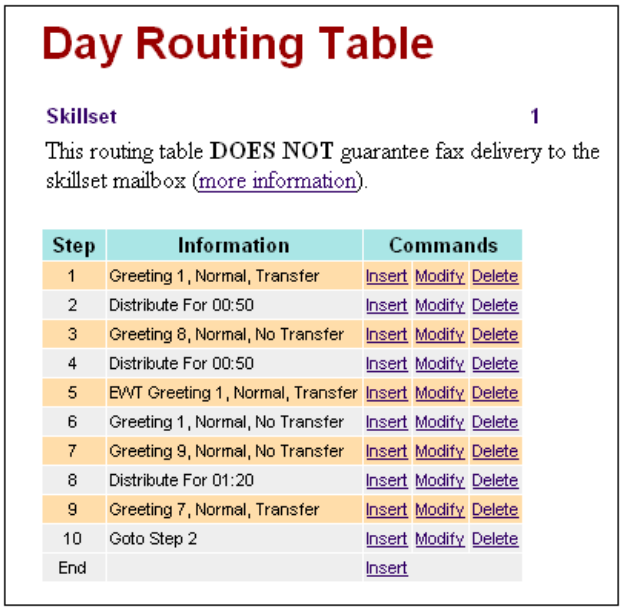
Lines

239	No	---	0	Change
240	No	---	0	Change
241	Call Center	Skillset 1	0	Change
242	Call Center	Skillset 2	0	Change
243	Call Center	Skillset 3	0	Change
244	Call Center	Skillset 4	0	Change
245	No	---	0	Change
246	No	---	0	Change

Skillset 1

Properties	
Name	Sales
MWI DN	333
Method	Least busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT increase allowed	Enabled
Initial call duration	00:03:00
Activity Code entry type	Prompted
Agents	1, 2, 3, 4, 15, 16, 17, 18, and 19

Routing Tables



Day Routing Table

Skillset 1

This routing table **DOES NOT** guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands
1	Greeting 1, Normal, Transfer	Insert Modify Delete
2	Distribute For 00:50	Insert Modify Delete
3	Greeting 8, Normal, No Transfer	Insert Modify Delete
4	Distribute For 00:50	Insert Modify Delete
5	EWT Greeting 1, Normal, Transfer	Insert Modify Delete
6	Greeting 1, Normal, No Transfer	Insert Modify Delete
7	Greeting 9, Normal, No Transfer	Insert Modify Delete
8	Distribute For 01:20	Insert Modify Delete
9	Greeting 7, Normal, Transfer	Insert Modify Delete
10	Goto Step 2	Insert Modify Delete
End		Insert

Day Routing Table steps

1 - Greeting 1
Advanced Caller Input: Table 1

2 - Distribute 00:50

3 - Greeting 8

4 - Distribute 00:50

5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox

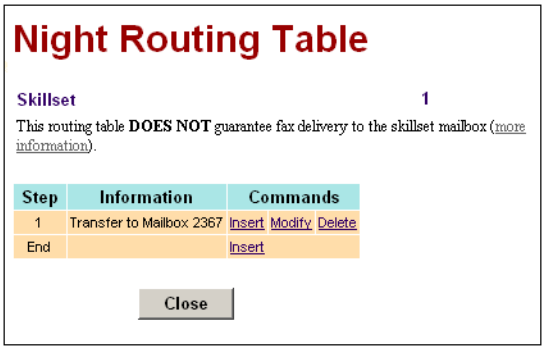
6 - Distribute 00:50

7 - Greeting 9

8 - Distribute 01:20

9 - Greeting 7
Basic Caller Input:
9 = Transfer to skillset mailbox

10 - Go to step 2



Night Routing Table

Skillset 1

This routing table **DOES NOT** guarantee fax delivery to the skillset mailbox (more information).

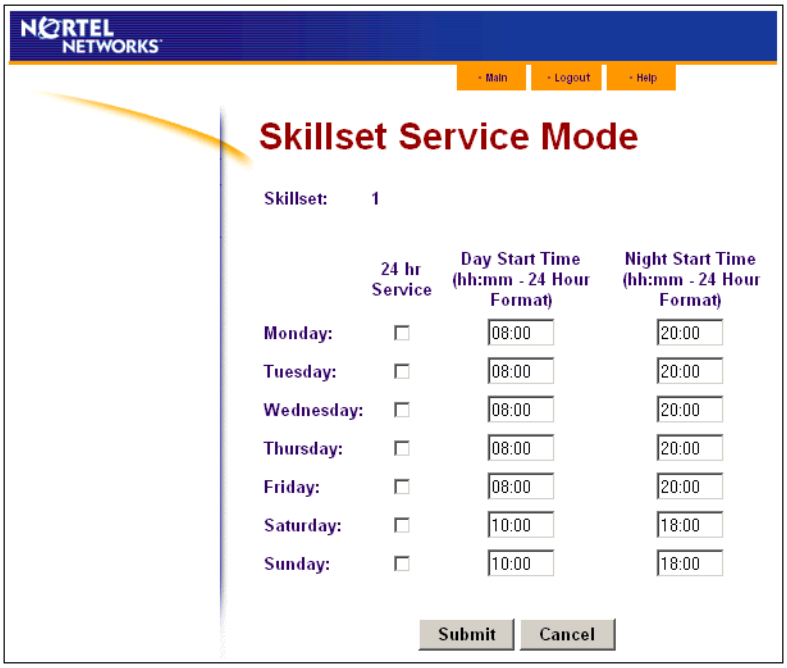
Step	Information	Commands
1	Transfer to Mailbox 2367	Insert Modify Delete
End		Insert

Close

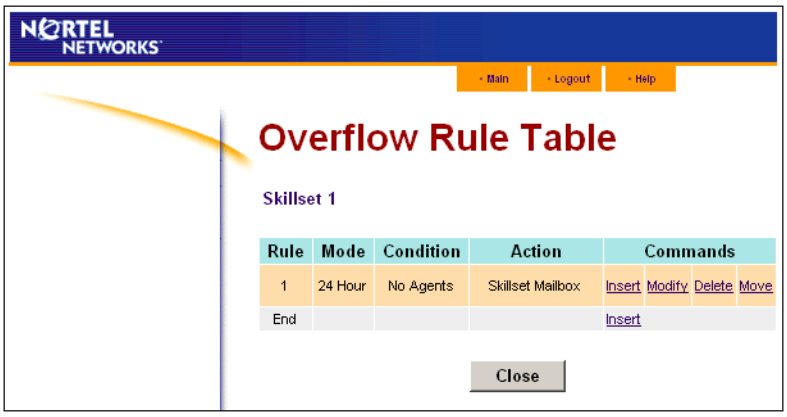
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



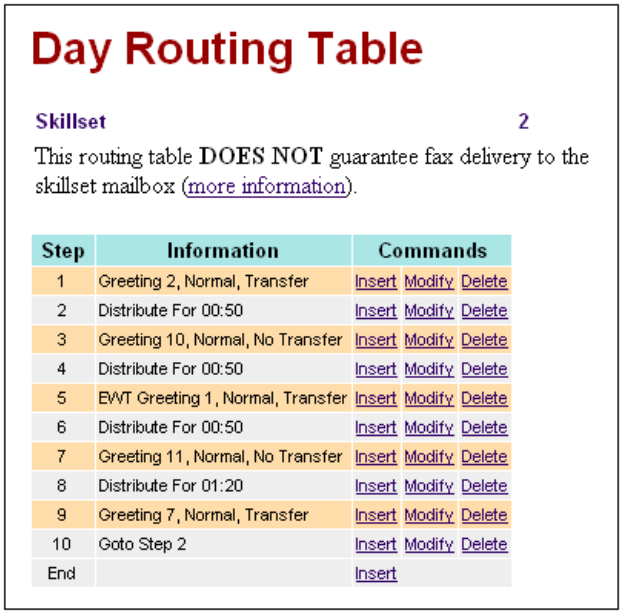
Overflow



Skillset 2

Properties	
Name	Support
MWI DN	334
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:03:00
Activity Code Entry Type	Prompted
Agents	21, 22, 6, 7, 8, 9, 10, 11, 12, 13, 14, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33

Routing Tables



Day Routing Table

Skillset 2

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands
1	Greeting 2, Normal, Transfer	Insert Modify Delete
2	Distribute For 00:50	Insert Modify Delete
3	Greeting 10, Normal, No Transfer	Insert Modify Delete
4	Distribute For 00:50	Insert Modify Delete
5	EWT Greeting 1, Normal, Transfer	Insert Modify Delete
6	Distribute For 00:50	Insert Modify Delete
7	Greeting 11, Normal, No Transfer	Insert Modify Delete
8	Distribute For 01:20	Insert Modify Delete
9	Greeting 7, Normal, Transfer	Insert Modify Delete
10	Goto Step 2	Insert Modify Delete
End		Insert

Day Routing Table steps

1 - Greeting 2
Advanced Caller Input: Table 2

2 - Distribute 00:50

3 - Greeting 10

4 - Distribute 00:50

5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox

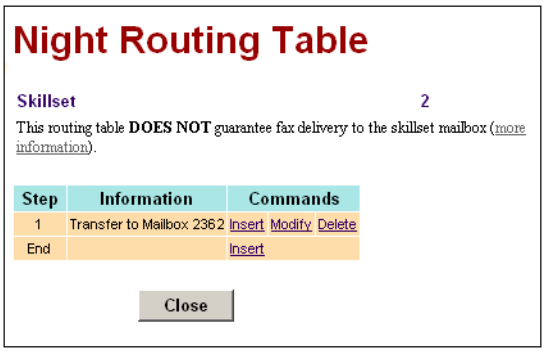
6 - Distribute 00:50

7 - Greeting 11

8 - Distribute 01:20

9 - Greeting 7
Basic Caller Input:
9 = Transfer to skillset mailbox

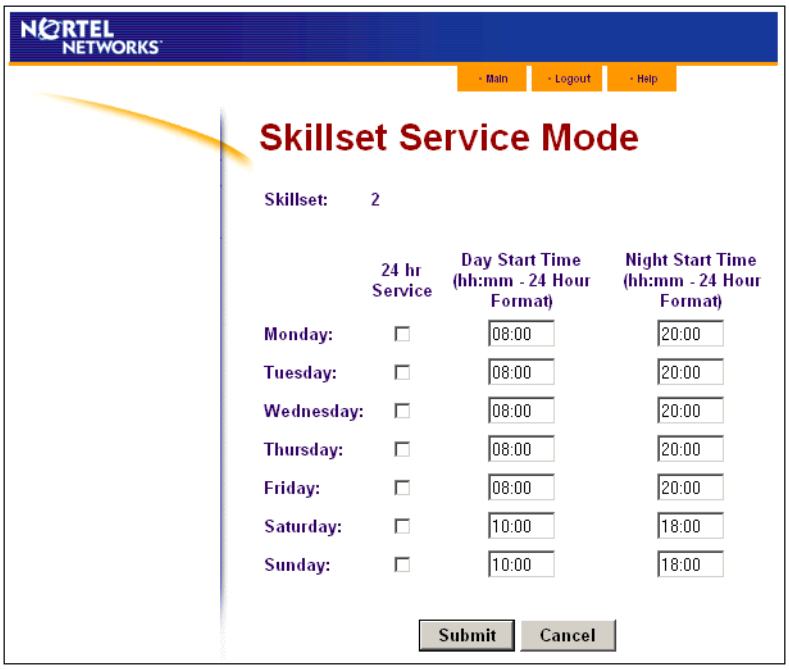
10 - Go to step 2



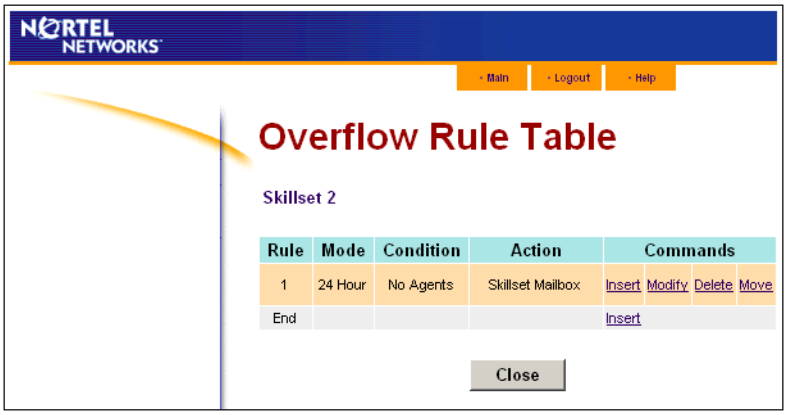
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



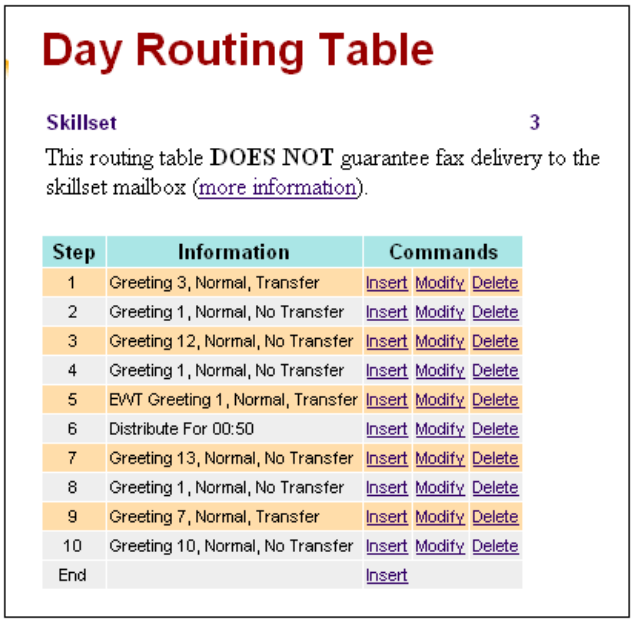
Overflow



Skillset 3

Properties	
Name	Installation
MWI DN	335
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:30:00 (hs:mm:ss)
Activity Code Entry Type	Prompted
Agents	5, 20

Routing Tables



Day Routing Table

Skillset 3

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands
1	Greeting 3, Normal, Transfer	Insert Modify Delete
2	Greeting 1, Normal, No Transfer	Insert Modify Delete
3	Greeting 12, Normal, No Transfer	Insert Modify Delete
4	Greeting 1, Normal, No Transfer	Insert Modify Delete
5	EWT Greeting 1, Normal, Transfer	Insert Modify Delete
6	Distribute For 00:50	Insert Modify Delete
7	Greeting 13, Normal, No Transfer	Insert Modify Delete
8	Greeting 1, Normal, No Transfer	Insert Modify Delete
9	Greeting 7, Normal, Transfer	Insert Modify Delete
10	Greeting 10, Normal, No Transfer	Insert Modify Delete
End		Insert

Day Routing Table steps

1 - Greeting 3
Advanced Caller Input: Table 2

2 - Distribute 00:50

3 - Greeting 12

4 - Distribute 00:50

5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox

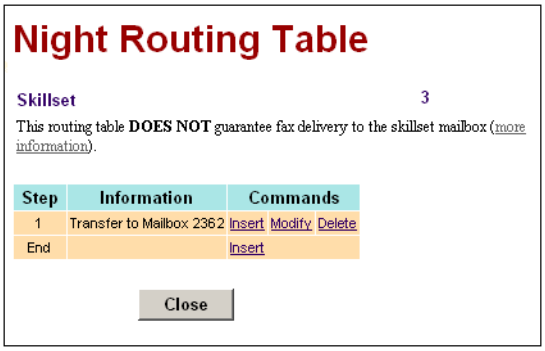
6 - Distribute 00:50

7 - Greeting 13

8 - Distribute 01:20

9 - Greeting 7
Basic Caller Input:
9 = Transfer to skillset mailbox

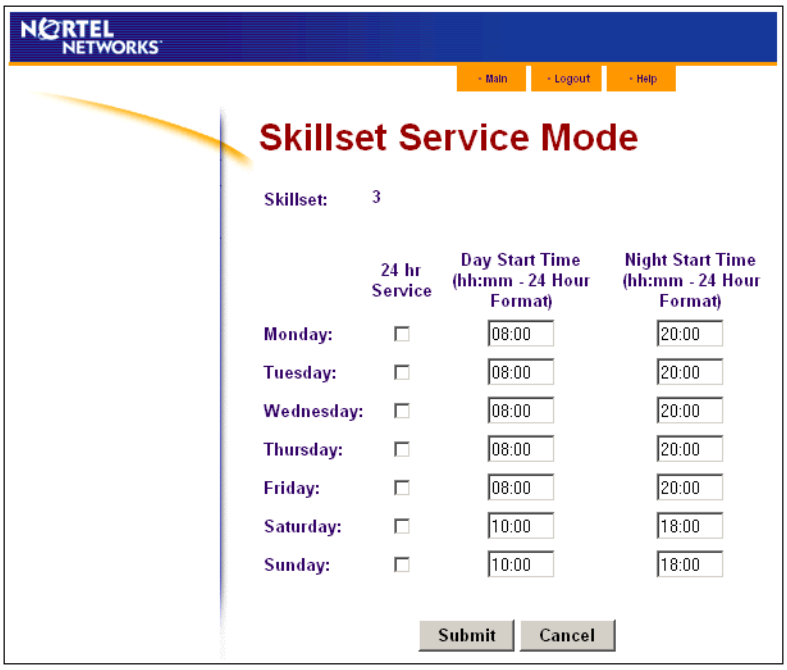
10 - Go to step 2



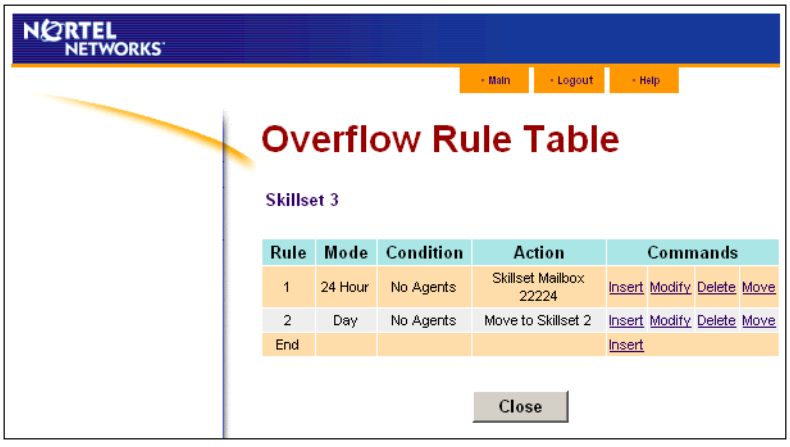
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



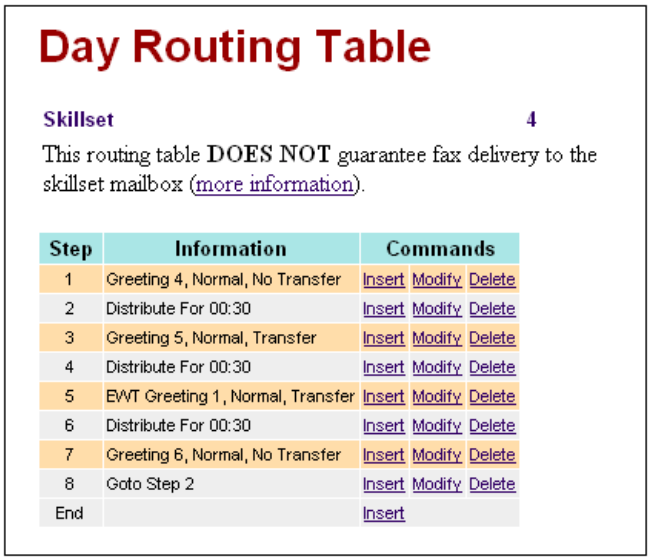
Overflow



Skillset 4

Properties	
Name	Preferred
MWI DN	336
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:30:00 (hs:mm:ss)
Activity Code Entry Type	Prompted
Agents	1, 2, 3

Routing Tables



Day Routing Table

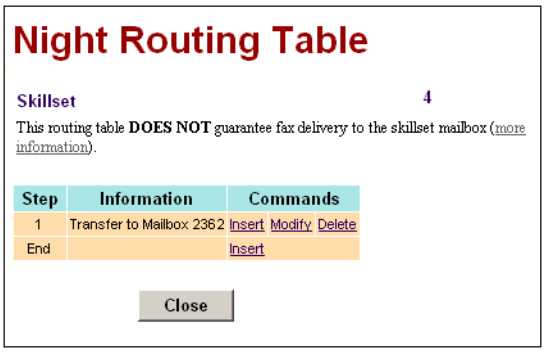
Skillset 4

This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands
1	Greeting 4, Normal, No Transfer	Insert Modify Delete
2	Distribute For 00:30	Insert Modify Delete
3	Greeting 5, Normal, Transfer	Insert Modify Delete
4	Distribute For 00:30	Insert Modify Delete
5	EWT Greeting 1, Normal, Transfer	Insert Modify Delete
6	Distribute For 00:30	Insert Modify Delete
7	Greeting 6, Normal, No Transfer	Insert Modify Delete
8	Goto Step 2	Insert Modify Delete
End		Insert

Day Routing Table steps

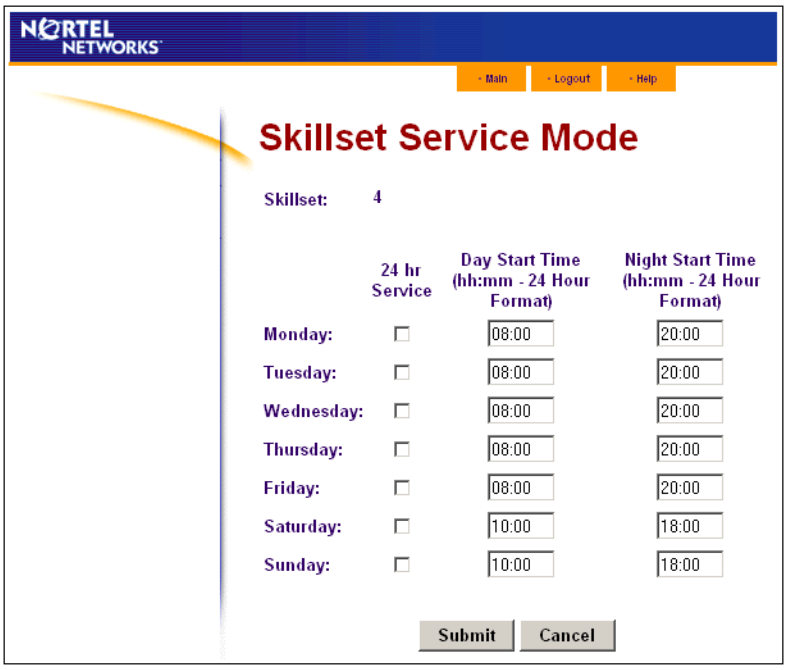
1 - Greeting 4
2 - Distribute 00:30
3 - Greeting 5
Basic Caller Input:
9 = Transfer to skillset mailbox
4 - Distribute 00:30
5 - EWT Table 1
Basic Caller Input:
9 = Transfer to skillset mailbox
6 - Distribute 00:30
7 - Greeting 6
8 - Go to step 2



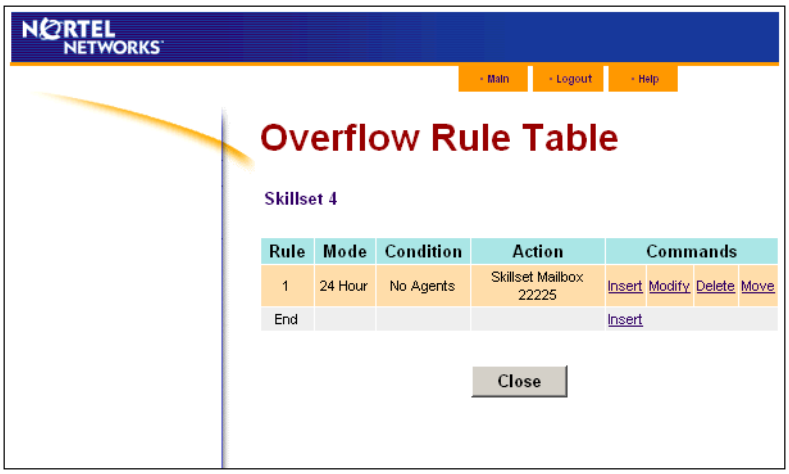
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



Overflow



Multimedia Call Center

Mosaic Hardwood Flooring wants to enhance their webpage to be voice-enabled. They send an e-mail to select customers with the latest information about new products and specials. The message has with an HTML link that links customers to Mosaic Hardwood Flooring staff.

Mosaic also puts voice-enabled HTL links on the web pages of their sponsors.

To meet the new load on the Call Center, Mosaic hires three new staff members as Multimedia Call Center agents. These agents take only Multimedia Call Center calls.

Here is how Mosaic configures their Basic Call Center:

"General properties" on page 236

"Activity Codes" on page 237

"Lines" on page 238

"Skillset 5" on page 238

- "Routing Tables" on page 239
- "Service Mode" on page 240
- "Overflow" on page 240

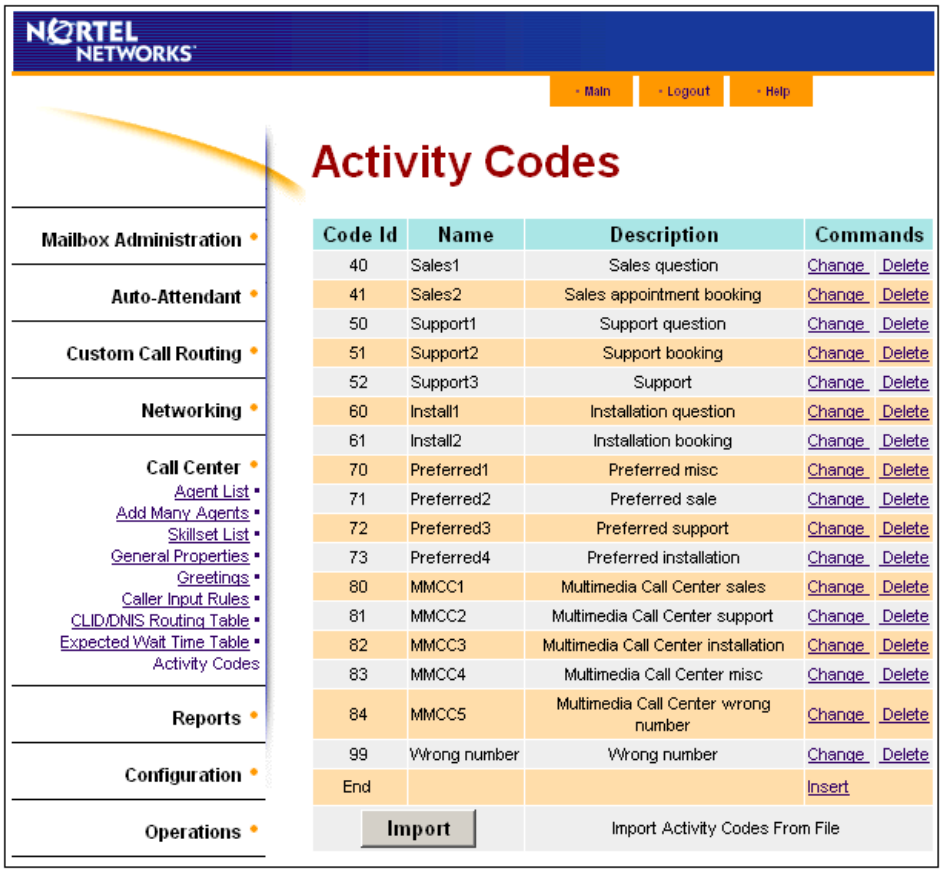
General properties

The General Properties, Caller Input Rules and EWT Tables are unchanged.

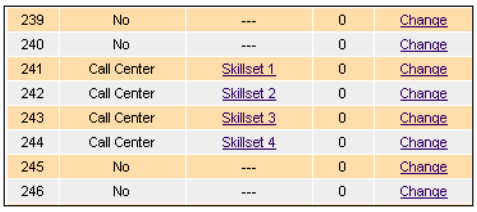
Additional keycodes	Multimedia Call Center
Agents	Agent 1- Bob Agent 2- John Agent 3- Jane Agent 4- Sales4 Agent 5- Installation booker 1 Agent 6- Installer1 Agent 7-14 Installers Agent 15- Sales5 Agent 16-19 Sales Agent 20- Installation booker 2 Agent 21- Supp_book1 Agent 22- Supp_book2 Agent 23-33 Installers Agent 34-36 MMCC Agents
Greetings	

Greeting 148	**Voice** Welcome to Mosaic Hardwood Flooring. Please stay on the line for one of our representatives. **Image** A picture of the company logo that Multimedia Call Center displays in callers' web browsers.
Greeting 149	**Voice** A service advertisement **Image** A picture that corresponds to the advertisement that Multimedia Call Center displays in callers' web browsers.
Greeting 150	**Voice** A product advertisement **Image** A picture that corresponds to the advertisement that Multimedia Call Center displays in callers' web browsers.

Activity Codes



Lines



239	No	---	0	Change
240	No	---	0	Change
241	Call Center	Skillset 1	0	Change
242	Call Center	Skillset 2	0	Change
243	Call Center	Skillset 3	0	Change
244	Call Center	Skillset 4	0	Change
245	No	---	0	Change
246	No	---	0	Change

Outdial with pool PRI-A

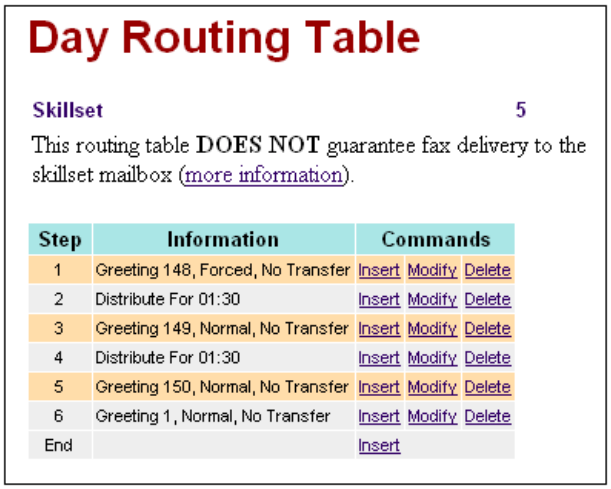
Skillset 5

Skillsets 1 - 4 are unchanged. See:

- “Skillset 1” on page 227
- “Skillset 2” on page 230
- “Skillset 3” on page 232
- “Skillset 4” on page 234

Properties	
Name	MMCC
MWI DN	337
Method	Least Busy
Attendant Ext	222
Use previous __ calls to calculate EWT	10
EWT Increase Allowed	Enabled
Initial Call Duration	00:03:00
Activity Code Entry Type	Prompted
Agents	31, 35, 36

Routing Tables



Day Routing Table

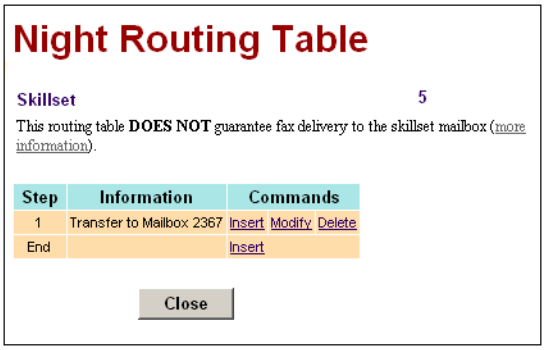
Skillset 5

This routing table **DOES NOT** guarantee fax delivery to the skillset mailbox (more information).

Step	Information	Commands
1	Greeting 148, Forced, No Transfer	Insert Modify Delete
2	Distribute For 01:30	Insert Modify Delete
3	Greeting 149, Normal, No Transfer	Insert Modify Delete
4	Distribute For 01:30	Insert Modify Delete
5	Greeting 150, Normal, No Transfer	Insert Modify Delete
6	Greeting 1, Normal, No Transfer	Insert Modify Delete
End		Insert

Day Routing Table steps

1 - Greeting 148 Forced Greeting
2 - Distribute 01:30
3 - Greeting 149
4 - Distribute 01:30
5 - Greeting 150
6 - Go to step 2



Night Routing Table

Skillset 5

This routing table **DOES NOT** guarantee fax delivery to the skillset mailbox (more information).

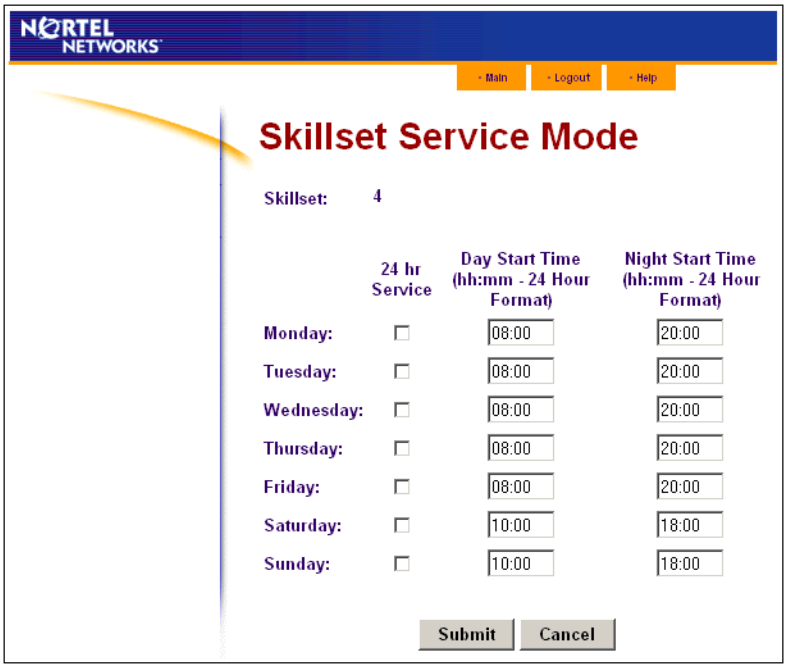
Step	Information	Commands
1	Transfer to Mailbox 2367	Insert Modify Delete
End		Insert

Close

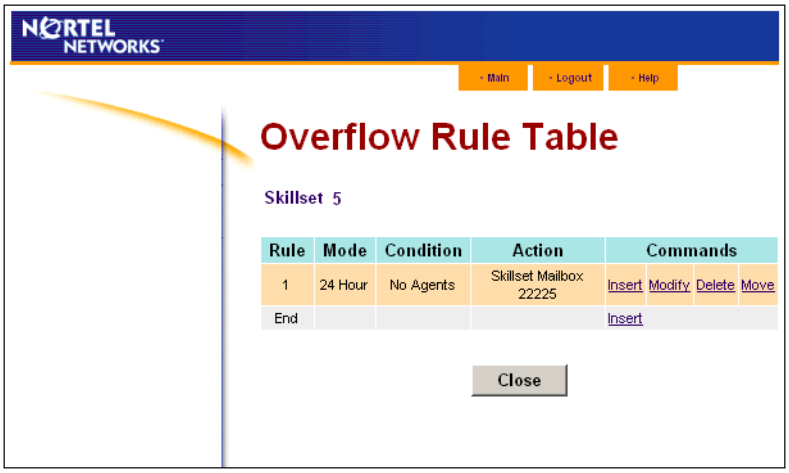
Night Routing Table steps

1 - Send to Skillset Mailbox

Service Mode



Overflow



Chapter 18
Troubleshooting Call Center

This chapter contains troubleshooting information for problems that can occur while setting up and operating Call Center.

Resetting passwords

You can reset passwords if they are lost or forgotten.

To reset	refer to
the Operator password	page 241
the Call Center Administrator password	page 242
a skillset mailbox password	page 67
an agent password	page 39

Resetting the Operator password

You can reset the Operator (9 8 2) password if it is lost or forgotten.
9 8 2 is used by the receptionist, Operator and Call Center Administrator.

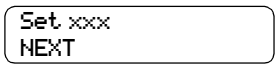
If you reset the Operator password it is reset to 6 7 3 7 2 8 6 7 (Operator).

To reset the Operator password using CallPilot Manager

1. Start CallPilot Manager.
2. Click the **Operations** heading.
3. Click the **Operator Settings** link.
   The Operator Settings page appears.
4. Click the **Reset Operator Password** check box.
5. Click the **Submit** button.
   The password is reset to 6 7 3 7 2 8 6 7 (Operator).

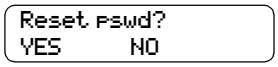
To reset the Operator password using a phone

1 Press ⊙ 9 8 5.



2 Press 7.
In this example, xxx represents the CDN for skillset 1.

3 Enter 7 3 7 3 8 6 7 3 7 7 7 9 3 (Resetoperpswd) and press OK.



4 Press YES.

5 The session ends.
The Operator password is now reset to 6 7 3 7 2 8 6 7 (Operator.)

Resetting the Call Center Administrator password

You can reset the Call Center Administrator password if it is lost or forgotten.

To reset the Call Center Administrator password using CallPilot Manager

For how to reset the Call Center Administrator password refer to "Call Center password access" on page 24.

Agent problems

Agent log on problems

If an agent cannot log on at their phone:

- ensure the agent ID and password match
- check to see if the agent is already logged on to a different phone
- check to see if a different agent is logged on to this phone

Important considerations about how agents use features

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code ([✆] [7] [0]) and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code ([✆] [7] [0]) and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call until the transferred call is answered.

Agents who want to transfer a call to a mailbox should use [✆] [9] [8] [6].

Agents who take only Multimedia Call Center do not receive Call Center voice calls, but other Call Center agents can transfer voice calls to Multimedia Call Center agents.

Call Forward

Advise agents not to use Call Forward. An agent who uses Call Forward is automatically logged out or made auto busy, depending on their agent settings, after the number of rings for transfer callback elapses. Agents can use Call Forward to the voicemail DN.

Activity Codes

Agents who answer a call on an Answer DN telephone or who use Call Pickup on a call that is ringing at another agent's set cannot enter activity codes.

Answer DN

The only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. You cannot hear calls that agents answer on their Answer DN. You can only hear calls that agents answer from the set they are logged on to. For more information about using Answer DNs with Call Center, refer to the *Business Communications Manager Programming Operations Guide*, Chapter 10, "Configuring DNs for system devices".

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Call Center does not recognize the agent as being busy, and still sends calls to the agent's main set.

Agents who log on from a regular telephone and answer Call Center calls using an answer DN key from a portable telephone cannot use Supervisor Help.

Do Not Disturb

Instead of using Do Not Disturb, agents must use the Not Ready Feature Code (9 0 8). If agents use Do Not Disturb they are automatically logged out or made not ready after the first call.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout. If a call is forwarded by CFNA to another agent and is answered by that agent, the original agent who has CFNA setting is made Not Ready or logged out instead of staying idle.

Preventing calls from ringing at an agent's set

To prevent agents who are on a Call Center call from having a second internal call ring on their phone, set the Call Forward on Busy feature for your set to the voicemail DN.

For information on programming any of these settings, refer to the *Business Communications Manager Programming Operations Guide* or the *Norstar System Coordinator Guide* if you use another system.

Hunt groups

Do not program an agent telephone to be a member of a Hunt Group.

Automatic Answer

How Automatic Answer works depends on what type of telephones your call center uses:

- **i2002 and i2004 IP telephones**: If you connect the headset before you initialize the phone, calls are heard over the speaker. If you initialize the IP telephone before you plug in the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the IP telephone. Every time you reconnect the headset you must initialize the headset.
- **Meridian and Norstar telephones**: If you use a headset, calls ring at the telephone and the headset, but calls go to the headset.
- **Business Series Terminals**: If you connect the headset before you connect the telephone cable to the phone jack, calls goes to the handsfree speaker. If you plug in the telephone before you connect the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the set. Every time you reconnect the headset you must initialize the headset. Calls always ring at the set.
- **T7316e**: This type of telephone supports Automatic Answer.

Follow-me browsing (Multimedia Call Center Agents only)

Follow-me browsing does not work with embedded Flash animations. If an agent clicks a Flash button, the image the agent sees is not displayed to the caller.

Tell agents that if the page they are sending to the caller contains Flash animations, they must tell the caller to display the page by, for example, clicking the Next button, or telling them what item to click on the page to display the next page.

Skillset problems

Problems enabling skillsets

Make sure that skillsets are assigned a valid CDN before you enable them. If you cannot enable a skillset, make sure you assigned it a valid CDN. For information about skillset CDNs refer to "Control DN" on page 44.

Problems changing skillset properties

If you cannot change a skillset's properties, there are two possible reasons:

- The call center skillset is enabled.
  You must disable the call center skillset before you can change the skillset properties.

- The skillset mailbox has the wrong extension number.
  Refer to "Determining a skillset mailbox number" on page 62 for how to determine a skillset's extension number. The extension number of the skillset mailbox must be the same as the Control DN of the skillset. If the skillset mailbox has the wrong extension, you cannot change the properties for a skillset mailbox.

To change a skillset mailbox CDN

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
   The Mailbox List page appears.
3. Click the **Change** link for the skillset mailbox.
   The page for the skillset mailbox appears.
4. In the **Extension** box type the CDN of the skillset.
5. Click the **Submit** button.

Problems viewing skillset settings

If you use Netscape Communicator version 4.77 and not all the Call Center settings shown in this guide appear in your browser, refresh the browser by clicking the View menu and clicking Reload.

Problems transferring calls to the voicemail extension

If you create a transfer in a Routing Table, Intelligent Overflow, or Caller Input Rules, the call transfers to the Automated Attendant rather than the CallPilot extension. We recommend you transfer to the skillset mailbox rather than the voicemail extension.

Call processing problems

To achieve the most efficient use of your Call Center, make sure you operate Call Center within its maximum limits. If you overload Call Center, slow or unpredictable call processing times can occur.

The Call Center maximum configuration limits are 80 active agents, 100 active calls and 50 skillsets. Although these are the configuration limits for Call Center software, we recommend that you are cautious about approaching the maximum of any of these limits. Business Communications Manager has other services that also use its hardware and software resources.

As a guideline, we recommend that if you are approaching the limit for agents, active calls or skillsets, you keep the other two settings at about half their configurable maximum or less.

For example, if your number of active agents is between	we recommend that your maximum number of active calls is between	and your number of enabled skillsets is between
41 - 80	1 - 50	1 - 25
1 - 40	51 - 100	1 - 25
1 - 40	1 - 50	26 - 50

Excessive Call Ringback

If callers hear ringback for a long time, possibly interrupted by distribute tones, partial or full greetings, before they get an agent:

- Check whether your Transfer Ringback Timer has a high threshold value. Set your transfer callback to a higher value than the ring delay for CFNA.

- Ask agents to use the Not Ready Feature Code ([✆] [9] [0] [8]) when they are not available to take calls. As explained in "Do Not Disturb" on page 244, agents must not use Do Not Disturb. Tell agents to set their CFNA to the voicemail extension, or the skillset extension if they do not have a mailbox. If agents use T7316 sets, all Call Center Feature codes (F904, 908 and 909) must be programmed to one of the bottom five keys on each side of the display.

Calls do not distribute to certain agents

Check that the agent is logged on and available. You can view the agent in Reporting for Call Center or supervisor monitor. Agents are automatically Logged Out or Made Not Ready if:

- a call is distributed to the agent and they do not answer the call. After the transfer callback timer has expired, the call goes back to the skillset and the agent will be made not ready or logged out, depending on your Call Center configuration.
- if the agent has Call Forward configured on their set (CFAC, CFNA, CFB)

Ask your administrator to check that your CDNs are valid.

Check that lines are assigned to only to one skillset. Do not assign Call Center lines directly to sets.

Tells agents that if they use CFNA to program their telephones CFNA to the voicemail extension, or the skillset extension if they do not have a mailbox. If agents use T7316 sets, all Call Center Feature codes (F904, 908 and 909) must be programmed to one of the bottom five keys on each side of the display.

Set your Transfer Callback to a higher value than the ring delay for CFNA.

Call Center never answers calls or takes a long time to answer calls

Check:

- that your skillset is enabled
- that disconnect is not the first step of a routing table
- in your skillset parameters how long your Delay Answer is
- the number of rings configured for your Call Center lines in Auto Attendant
- that you have correctly configured the CDN for the skillset
- ask your System Administrator to check that your CDN is valid:
  - **a** In Unified Manager, click the **Diagnostics** and **MSC** keys and click the **DN to Port Conversion** heading.
  - **b** In the **DN to convert** box enter the CDN for the skillset and press enter.
    Check that the port number that appears in the Device port box does not resides on BUS 1 or 8.
  - **c** Click the **Resources** and **Media Bay Modules** keys, and check all the buses until you find your port number. and make sure the bus that your port is on is assigned to a Digital Station Module. The only modules that a CDN can reside on are Digital Station Modules. They do not have to be equipped but they must be programmed for BUS type: Station Module. CDNs are invalid if they reside on any other type of module.

Call Center calls do not follow Call Forward rules, but non-Call Center calls do

For example, an agent is logged onto a set that is configured to CFNA to voicemail. A call is distributed to the agent, who does not answer it, and the call is returned to the skillset, but the desired behavior is to transfer the call to voicemail. Non-Call Center calls that do not get answered do go to voicemail.

To have non-Call Center calls to go to voicemail and Call Center calls to return to the skillset, make sure that the number of rings for Call Forward to Voicemail is set to greater than the Transfer Callback Timer.

To have both Call Center and non-Call Center calls to go to voicemail, make sure that the number of rings for Call Forward to Voicemail is set to less than the Transfer Callback Timer.

Also make sure that Call Centre agents have a CFNA Delay to voicemail/skillset DN that is lower than the Transfer Callback setting. This way, unanswered Call Centre calls return to the originating skillset and non-Call Centre calls are forwarded to the agent's personal mailbox.

Callers hear the message "Your session cannot be continued at this time. Exiting the system. Goodbye."

This happens if:

- an incoming Call Centre call is transferred to an available agent but the agent has left their desk and are still logged on, but has not made themselves Not Ready

  and
- the first step in a Routing Table is a Distribute step. The first step for all routing tables should be a Greeting. If a call enters a skillset that has a Greeting as step 1 and there are available agents, the call is transferred to the available agent without hearing the greeting, unless it is a Forced Greeting.

Chapter 19
Call Center Programming Record

For this programming task	see	on page
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Record the number of reserved channels, the Primary and Secondary Alert times and the Master Client Address	General Call Center properties	252
Record agent ID, agent name, Priority, supervisor status and skillset for each agent	Call Center agents	256
Record Control DN, skillset name, MWI ext, Method, Break Time and Delay Answer time limit	Call Center skillsets	253
Record greeting numbers and information about them	Call Center Greetings	253
Record the Intelligent Overflow Routing parameters for each skillset	Intelligent Overflow Routing	255
Record agents assigned to the skillsets	Skillset assignments	257
Record the skillset mailbox name, skillset mailbox number, MWI extension and skillset mailbox password	Skillset mailboxes	258
Record the type of step and step parameters for Day and Night Routing Tables	Routing Tables	259
Record Caller Input Rules	Caller Input Rules	260
Record CLID/DNIS Routing	Intelligent CLID/DNIS Routing	261
Record Line Answering details	Line answering	262

Note: Make copies of these pages as required.

Feature Codes

Feature code name	Dialpad buttons	Custom Feature Code
Display Waiting Calls	✆ 9 0 9	✆ 9 _____ _____
Open Mailbox	✆ 9 8 1	✆ 9 _____ _____
Log on/Log off	✆ 9 0 4	✆ 9 _____ _____
Not Ready	✆ 9 0 8	✆ 9 _____ _____
Return to skillset on No Answer		✆ 9 _____ _____
Voicemail DN	✆ 9 8 5	✆ 9 _____ _____
Operator status	✆ 9 8 2	✆ 9 _____ _____
Supervise	✆ 9 0 5	✆ 9 _____ _____
Supervisor Help	✆ 9 0 6	✆ 9 _____ _____

General Call Center properties

Number of Reserved channels	
Primary alert time limit in mm:ss	
Secondary alert time limit in mm:ss	
Master Client Address	
Enable Caller ID	
Supervisor Help	
CLID settings	

Operator/Business Status

Password **OPERATOR** (**67372867**)			
Receptionist or Operator available*		Y N	
Business open*		Y N	
Answer lines		Y N	
Receptionist or Operator extension			
Call Center Service*	Skillset Number ___	Auto	
		Manual	Day Night
	Skillset Number ___	Auto	
		Manual	Day Night

* These settings are usually changed by the receptionist or Operator on a daily basis.

Call Center skillsets

Skillset parameter	Rules	Default	Skillset #
Skillset name	Maximum 16 characters	SKILLn	
Control DN (CDN)	Extension cannot be used by another telephone or peripheral		
MWI extension			
Method	Least Busy or Preferred	Least Busy	
Break Time	Enter as mm:ss minimum: 00 min 00 sec maximum: 59 min, 59 sec	00:30	
Delay answer	Enter as mm:ss minimum: 00 min 00 sec maximum: 10 min 00 sec	00:00	
Attendant ext	Attendant extension for the skillset. If clear, the operator extension is used	not selected	
Use previous _ calls	The number of previous calls used to calculate EWT.	10	
EWT increase allowed		selected	
Initial Call Duration	call time used to calculate EWT before the number of calls specified in Use Previous is reached.		
Language	Primary or alternate. Appears if Bilingual is enabled in the system properties		

Call Center Greetings

Greeting number	Greeting information

Intelligent Overflow Routing

Skillset:		
Service Mode (circle one)	**Conditions**	**Action**
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ___ Overflow to skillset(s): _____ Send to skillset mailbox

Call Center agents

Agent ID and type	Agent name	Supervisor status Y/N	Names and #s of skillsets agent is assigned to	Priority	Missed Call Option	Auto Answer Y/N

Skillset assignments

Skillset name and #	Agent ID and name	Priority

Skillset mailboxes

Skillset #	Mailbox name	Mailbox number (Control DN)	MWI extension	Mailbox password

Routing Tables

Skillset # _____ **Day or Night** _____

Step #	Type of step: Greeting, Distribution, Transfer, Intelligent Caller Input Routing Basic or Advanced, Disconnect	Step parameters

Caller Input Rules

Rule table # _____ **Length: Fixed** _____ **Variable** _____

Match string	Action

Intelligent CLID/DNIS Routing

Type of call: Line, Multimedia Call Center, CLID/ANI, DNIS	Action

Line answering

Line #	**Skillset #**	**# of rings** (0 to 12) for Caller ID minimum 2 rings	**Expected Wait Time settings**

Glossary

AA

See *Automated Attendant*.

Agent

An agent is a person who is assigned to answer calls for one or more skillsets in your call center.

Agent ID

When you add an agent, Call Center assigns an agent ID number you use to identify the agent. The agent uses their agent ID number and password to log on when they are ready to receive calls.

Alert times

Alert times are time limits that you assign for calls waiting in skillsets. If a call exceeds the Primary or the Secondary alert time limit, a programmed memory button indicator flashes. A slow flash means that a call has exceeded the Primary alert time. A quick flash means that a call has exceeded the Secondary alert time.

Attendant

The attendant is the person who you assign to answer an extension number. The attendant can be a receptionist, operator or target attendant.

Automated Attendant (AA)

The Automated Attendant is similar to an automatic answering service. AA answers incoming calls with a Company Greeting and a menu of options. AA routes calls in response to a caller's dialpad selections. For a greater range of options and services for incoming calls, a Custom Call Routing (CCR) menu can be assigned to play instead of the Automated Attendant menu.

Automatic Answer

Automatic Answer (previously called *Force Call*) is an agent parameter that force delivers calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode.

If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must manually answer the calls.

Break Time

Break Time is a time period you set up for agents to complete paperwork or other tasks after they finish a call. After an agent completes a call, they are taken out of the skillset for this Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code.

CCR

See *Custom Call Routing*.

CDN

See *Control Directory Number*.

Call Center

Call Center receives, holds and routes calls to agents in a call center.

call center

A call center is a department or a business that uses Nortel Networks Call Center to handle numerous incoming calls. A call center typically employs several agents to answer calls.

Call Center Administrator

The Call Center Administrator sets up, and manages the day-to-day operation of a call center. The Call Center Administrator monitors the overall performance of the call center and balances the staffing according to call traffic demands.

Call Forward All Calls

This feature forwards all calls from a phone to another extension number. For example, all calls from a telephone can be forwarded to the CDN of a skillset.

Call Forward No Answer

This feature forwards unanswered calls from a phone to another extension number. A call is considered unanswered if no one answers the call before a specified number of rings.

Call Forward On Busy

This feature forwards all calls from a phone to another extension if all the lines assigned to the phone are busy.

CallPilot

CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Auto Attendant and call handling capabilities

CallPilot includes voicemail, Auto Attendant, Custom Call Routing and Fax Answering features.

CallPilot also has optional features such as Fax, Call Center, Desktop Messaging and Messaging that enhance your communications. What options are available to you depends on what system you use. For more information about CallPilot, see the *CallPilot Manager Set Up and Operation Guide*.

Channel

A channel is the voice path that Call Center uses to play greetings to callers. A voice channel is also the voice path used when anyone uses a Feature Code to access Call Center.

Class of Service

The Class of Service defines the values for mailboxes.

Control Directory Number (CDN)

The Control Directory Number (Control DN or CDN) is the extension number of a Call Center skillset. The CDN is the number used to transfer calls to a skillset. The CallPilot installer is responsible for assigning a CDN to each skillset before the skillset can be enabled.

Custom Call Routing (CCR)

CCR is a routing feature that you can program to present a customized menu of single-digit choices to callers. CCR automatically answers lines with customized menus. With CCR, callers can listen to pre-recorded messages, leave a message in a skillset mailbox or transfer to an extension. With CCR you can replace Automated Attendant menus with a more sophisticated menu that offers callers a wider range of options.

Delay Answer

Delay Answer is a feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a skillset has Delay Answer activated, waiting callers hear ringback.

When a call comes in on a line for a skillset that does not have any free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever comes first.

Display Waiting Calls

Display Waiting Calls, (previously known as *Queue Status*), is a Feature Code that you and agents can use to display waiting calls and view real-time information about skillsets. The Display Waiting Calls/Skillset Status Feature Code shows:

- the skillset number and whether the skillset is enabled or disabled
- number of agents logged into the skillset
- number of calls waiting
- the longest wait time of a call

DN

DN is a Directory Number or an extension number.

Dynamic agent priority

On Business Communications Manager agents can have a different priority depending upon which skillset they are logged on to. For example when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

Dynamic call priority

Call priority is distinct from agent priority. If a waiting call needs to be routed, for example when an agent becomes available, Call Center determines which waiting call must be handled next. This is the call with the highest priority, or, if all the waiting calls have the same priority, the call with the longest wait time. Call Center then determines the right agent to handle the call. If the skillset's method of call distribution is Preferred, Call Center finds the available agents assigned to and logged in to the skillset, and chooses the one with the highest priority. If the method is Least Busy, the agent that has been available longest is routed the call.

Greeting Table

The Greeting Table determines which recorded greeting is played and which line is answered according to the time of day.

Indicator

See *memory button indicator*.

Intelligent Caller Input Routing, Advanced

Intelligent Caller Input Routing, Advanced lets callers route their calls based on multi-digit fixed or variable rules that you create in the Caller Input Rules Tables.

Intelligent Caller Input Routing, Basic

Intelligent Caller Input Routing, Basic (Previously called *Basic Transfer*), lets callers direct their calls to an Operator, Automated Attendant, skillset mailbox, CCR Tree or internal or external number.

Intelligent CLID/DNIS Routing

CLID/DNIS Routing is the initial routing that Call Center calls encounter. The CLID/DNIS Routing you set up lets Call Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from.

Intelligent Overflow Routing

Intelligent Overflow Routing uses routing rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, a CCR Tree, the Automated Attendant or an operator.

Least Busy

Least Busy, (previously called *Longest idle*) is a method of call distribution that routes calls to the agent who has been available the longest. The other method of call distribution is Preferred.

MWI

See *Message Waiting Indication*.

Memory button indicator

Memory button indicators are the triangular-shaped indicators on a phone next to the memory buttons. Memory button indicators can be used to monitor call activity and view the Login/Logout status and the Not Ready status of agents.

Message Waiting Indication (MWI)

The Message Waiting Indication appears on a phone display as *Message for you* when there are new messages.

Message Waiting Indication extension (MWI extension or MWI DN)

For each skillset mailbox, you can assign a phone as the designated MWI extension. The Message Waiting Indication extension is an optional phone number that indicates when a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the phone display when there are new messages in the skillset mailbox.

Method of Call Distribution (Method)

The method of call distribution determines which of several available agents to route the call to. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes calls to an agent who has been available the longest. Preferred routes calls to the agent with the highest priority (the best qualified agent).

Not Ready

Not Ready, (previously known as *Make Busy*), is a Feature Code that extends a Break Time if agents need additional time after a call to do paperwork or other tasks.

Off-premise Message Notification

Off-premise Message Notification is a feature that notifies you at a destination number when there are new or urgent messages in a skillset mailbox.

Priority

You assign a priority to each agent according to their qualifications. On Business Communications Manager Professional, agents can have *dynamic agent priority*.

Primary alert time

The Primary alert time is the first time limit that you assign for calls waiting in skillsets. If a call exceeds the Primary alert time limit, you are given a visual warning on programmed memory button indicators. The other alert time is Secondary alert time.

Make Not Ready (Return to Skillset)

Make Not Ready (Return to Skillset), (previously known as *Auto Make Busy*) is an agent property that controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call.

Real time

Real time is a term for when there is very little response time between when an event occurs and when the information about the event is displayed. You can monitor the real time or current situation of agents and call activity by using the Display Waiting Calls Feature Code.

Reserved channel

Reserved channels are voice channels reserved exclusively for Call Center. Reserved channels are used to play greetings to callers waiting in a skillset. These channels ensure that CallPilot does not use all the voice channels. See also *voice channel*.

Routing Table

Routing Tables handle incoming calls for each skillset. A Routing Table determines the order of greetings and hold times for callers while they wait to be routed to an available agent.

Skillset

Skillsets, (previously called *queue*s) collect and distributes calls for departments such as "sales" and "technical support". If several calls arrive at the same time, the calls are held in a skillset where callers hear greetings and are put on hold until an agent is available.

Skillset mailbox

A skillset mailbox stores messages left by callers. The calls can be retrieved by designated agents.

Skillset name

The skillset name is a maximum of 16 characters. A skillset name is the same as the skillset mailbox name.

Supervisor

A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers.

Supervisor monitor

Supervisor monitor is a feature supervisors can use to monitor or participate in calls between agents and callers.

Voice channel

A voice channel is the voice path that Call Center uses to play greetings to callers.

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